

KNOWLEDGE AND INFORMATION MANAGEMENT STRATEGY

Submitted to the

**Canadian International Development Agency (CIDA)
Egypt Country Program**

Submitted by

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ACRONYMS AND ABBREVIATIONS

CCTs	Cross-Cutting Themes
CIDA PSU	Canadian International Development Agency Program Support Unit
CoP	Community of Practice
ECEEP	Early Childhood Education Enhancement Project
FAQs	Frequently Asked Questions
HoA	Head of Aid
HQ	Headquarters
sIKM	Information and Knowledge Management
IMT	Information Management and Technology
KIM	Knowledge and Information Management
KM	Knowledge Management
KMO	Knowledge Management Officer
KMS	Knowledge Management System
LFA	Logical Framework Analysis
LL	Lessons Learned
M&E	Monitoring and Evaluation
NGO	Non-governmental Organization
PKMB	Performance and Knowledge Management Branch
PSD	Private Sector Development
PVO	Private Voluntary Organization
SDI	Selective Dissemination of Information
SURFs	Sub-Regional Resource Facilities
ToR	Terms of Reference
UN	United Nations
UNDP	United Nations Development Programme
UNFPA	United Nations Population Fund
UNICEF	United Nations Children's Fund
WB	World Bank

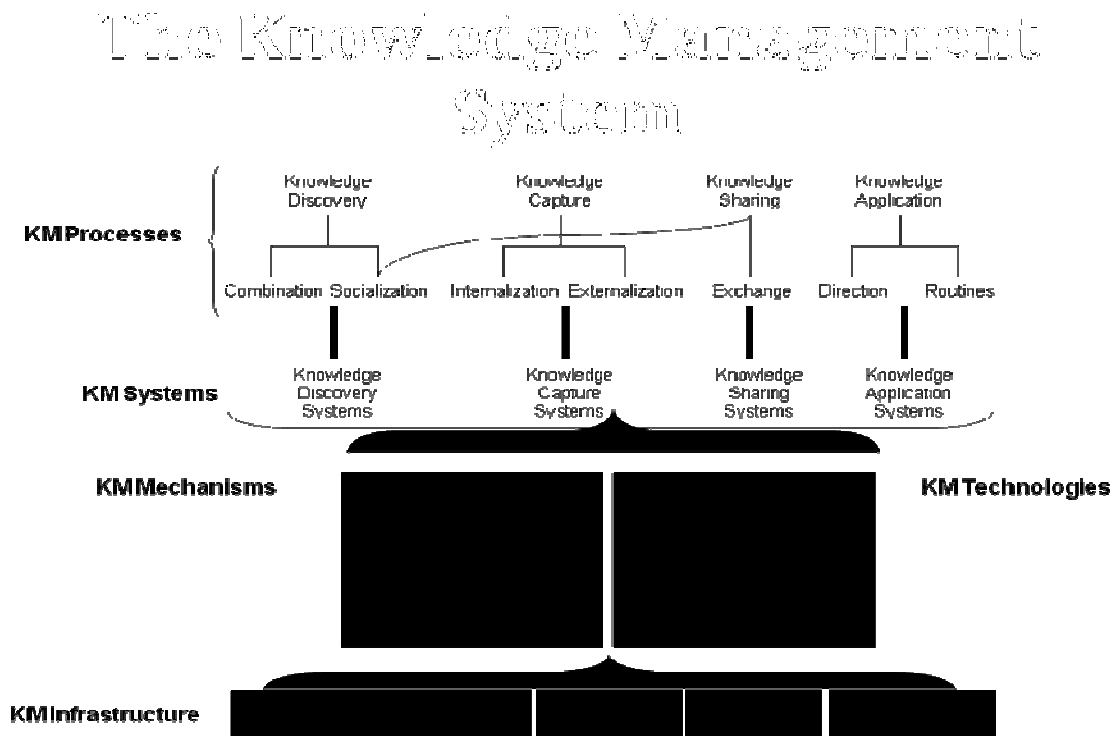
I. INTRODUCTION

A. Background

Most organizations today consider knowledge (intellect) to be their most valuable asset, whose management is of great priority. While several international organizations operating in Egypt have a knowledge management strategy at their headquarters, it has not been linked to the Egypt country offices yet. Yet there is unanimous agreement that knowledge management is a helpful means to support and develop work efficiently and effectively.

"Broadly defined, Knowledge Management (KM) is the process of capturing, storing, distributing implementing and developing knowledge within the framework of the internal and external environments of the organization, with the aim of increasing efficiency and effectiveness of this organization."¹ In simple words, KM focuses on organizing and making available important knowledge, wherever and whenever it is needed.

KM is a trans-disciplinary approach which aims at improving organizational outcomes and learning, through maximizing the use of knowledge. It involves the design, implementation and review of all activities and processes to improve the creating, sharing, and applying or using of knowledge. KM is concerned with innovation, sharing behaviors, managing complexity and overcoming ambiguity through knowledge networks and connections, exploring possible smart processes, and deploying new KM supporting technologies.



¹ FakhrEIDin, Hadia. Unpublished Ph.D. Thesis, 2006.

B. KM at CIDA

In 2008, CIDA Egypt has commissioned a study to identify and analyze the types of knowledge available within the CIDA program, assess existing and potential opportunities, and highlight organizational prerequisites to optimize the creation and dissemination of knowledge. Currently, the Country Development Program Framework (CDPF) is ending and is being replaced by the CIDA Country Strategy for Egypt, which presents a change in scope and focus. Egypt is now considered a Country of Modest Presence, with considerably reduced budget allocations. A Forward Looking Assessment (FLA) was conducted to guide the Program in Egypt and recommend an Operational Review of the Program Support Unit (PSU) project, which in turn recommended that the Knowledge and Information Management be vigorously activated to "capture information and knowledge acquired, tools/material developed, lessons learned and best practices/approaches tested in the operational projects, of which several are closing shortly"².

Given this obvious commitment and shared understanding, this is a perfect timing for KM and the corresponding strategy and framework to be put forward. Downsizing needs are making it a necessity to overcome the potential loss of corporate memory and relevant expertise. In addition, CIDA Egypt personnel, partners and stakeholders - with no exception - believe that KM is of high importance, given the considerable tacit knowledge available within the CIDA Egypt program, which needs to be captured and utilized.

CIDA Egypt is therefore developing a KM strategy, which provides a unique opportunity to gain a greater understanding of the operation of an organization, its future direction and aims, as well as an evaluation of the challenges that confront it. By focusing on identifying staff needs and issues, activities and initiatives can be recommended with the confidence that these will have a clear and measurable impact upon the organization. Supplementing this 'bottom-up' research/analysis with a strategic focus then ensures that the KM initiative is aligned with broader organizational directions. Taking this approach to the development of a KM strategy allows limited resources to be targeted to the key needs within the organization and delivering the greatest business benefits, while positioning the organization for long-term growth and stability.

The proposed CIDA KM strategy is based on feedback from CIDA's Result Based Management (RBM). It has a "people-centered" approach and relies highly on human interaction (as this is where the wealth of knowledge of CIDA lies) and is supported by appropriate technical components to make it function as effectively as possible. It is designed to be flexible with potential for expansion, to make adjustments/improvements and/or changes in direction/scope possible along its implementation process.

The strategy consists of five overlapping phases: infrastructural evaluation; KM system analysis, design and development; deployment; and evaluation and incremental refinement of the KM system. All CIDA stakeholders were involved in the development of the strategy through their initial suggestions and recommendations and later on through their feedback in various forms.

² Terms of Reference, Short-term Consultancy, Knowledge and Information Management (KIM) Framework and Implementation, p. 1.

The main key players for the execution of the strategy are the Knowledge Management Officer (KMO) and the KM Committee. The first is the focal point of the KM strategy and is the one in charge of implementing and managing the system. The KMO is guided by the KM Committee, which represents the various CIDA Egypt stakeholders.

For the KM strategy to achieve its goals and objectives, it requires the support and commitment of all stakeholders on all CIDA Egypt levels: the level of the projects, the program, Head Quarters (HQ) and to an extent also other donors and partners.

II. Methodology and Approach

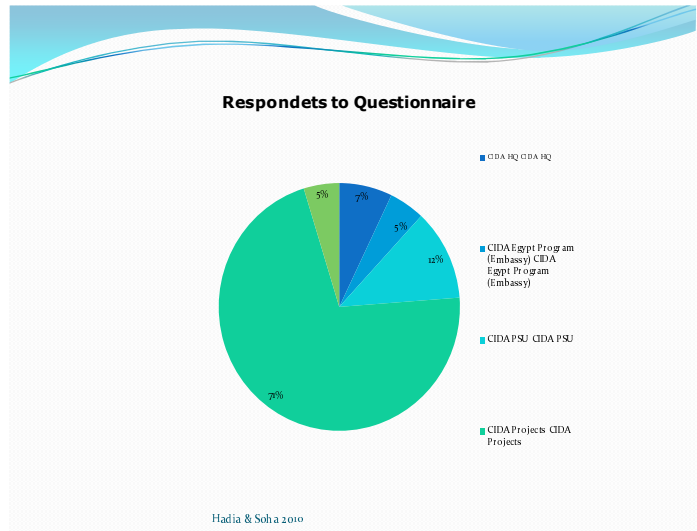
In accordance with the above, the proposed CIDA Egypt KM Strategy aims to fulfil the following objectives:

- Capturing and storing CIDA-Egypt Program explicit and tacit knowledge with emphasis on the Egypt programme;
- sharing and disseminating knowledge between HQ, CIDA Embassy, PSU, Projects and other stakeholders and beneficiaries;
- supporting and enhancing the development and application of further explicit and tacit knowledge by users of the system;
- enhancing visibility and public awareness of the CIDA Egypt program, through leveraging collected knowledge beyond CIDA; and
- keeping the knowledge repository and the KM system updated and up-to-date.

To achieve these objectives, the KM strategy is designed based on a thorough analysis of CIDA Egypt's current and future needs, requirements, experiences and achievements. The strategy is also based on information solicited from:

- Literature review of the CIDA Egypt Program internal documents and the state of KM, including, but not limited to:
 - research conducted in 2008 and documented in the draft report on the Information and Knowledge Management Strategy submitted to CIDA by Environmental Quality International in November 2008;
 - CIDA Annual Work Plan 2009-2010;
 - ToR of Short-term Consultancy on Knowledge and Information Management (KIM) Framework and Implementation; and
 - national and international best practices in the area of KM.
- Results of the "Knowledge for Change", CIDA Lessons Learned Workshop, January 26–28, 2010, including the questionnaire undertaken at the end of the Workshop, administered to most participants (please refer to ANNEX I for questionnaire).

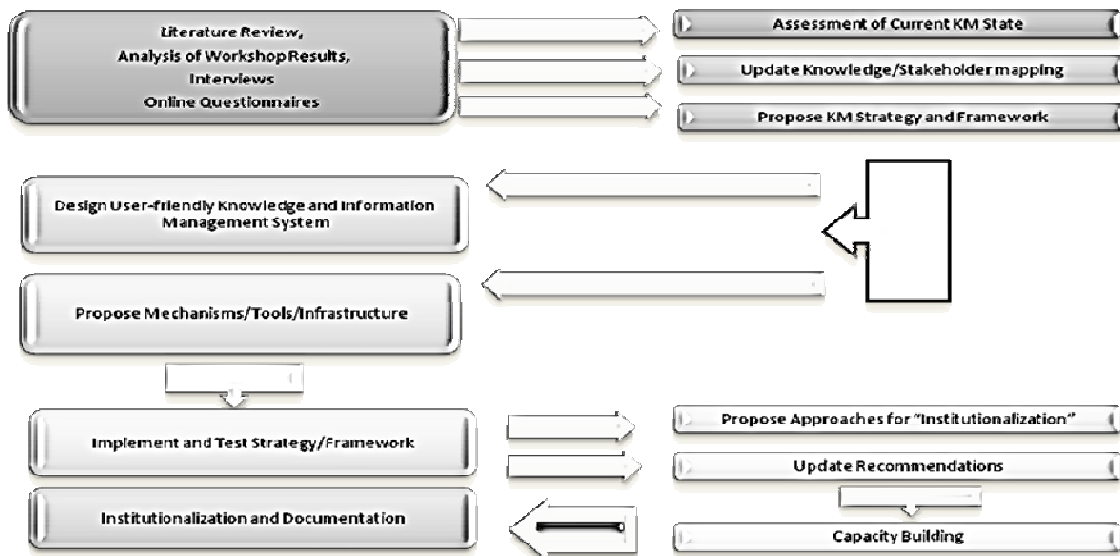
- In-depth interviews of current KM practices and expectations with key CIDA personnel/advisors/consultants, PSU officers and project directors/officers (please refer to ANNEX II for List of Interviewees).



- Online questionnaire to complement the knowledge mapping/audit of KM needs.
- Information from CIDA HQ regarding CIDA KM strategy and tools.

- Feedback received from CIDA/PSU on draft KIM Strategy submitted March 10, 2010.
- Results of the "Creating a Culture of Learning and Knowledge Sharing" Workshop, May 19-20, 2010.
- Feedback received from:
 - Monitoring and evaluation of the strategy and framework after implementation.
 - Users.

Approach



III. ACTIVITIES, RESPONSIBILITIES AND TIMELINE

Designing and implementing a Knowledge Management Strategy reflecting the approach exhibited above involves the following activities:

A. Infrastructural Evaluation

1. Analyze the Existing Infrastructure

This involved identifying what is already in place vs. critical gaps in existing infrastructure, so as to build on what already exists, and gain an understanding of various components that constitute the KM strategy and technology framework.

Initial analysis showed that many staff members store their internal documents on the shared drive of their respective offices, which may at first glance seem effective; however, it is very important to note that the shared drive is only shared within each office separately, with no drive shared between the Embassy, the PSU and various projects. This reflects negatively on the accessibility of documents. Inaccessibility is further magnified by the fact that several team members keep their documents on the hard drive of their own computers, while yet others keep their documents as hard copies in their offices.

The servers of the individual offices, e.g. CIDA Embassy and PSU are totally isolated. The server at PSU is generally not used for sharing documents/information. Emails are the tool most often used to exchange documents and information. This is based on personal requests/coordination. There is a definite need to have shared areas between the entities.

Actions taken: suitable methods of knowledge dissemination at various levels, taking available infrastructure into account, were proposed.

Results obtained: KM Strategy and Framework, designed to utilize available resources most effectively.

Resources used: undertaken as part of the ongoing assessment activities of the Technical Consultants.

Responsibility: Technical Consultants.

Date completed: end of April.

Outcome/recommendation: Mechanisms and Technologies are recommended. When it comes to technologies, there is an immediate need for an intranet for CIDA stakeholders and updated website. When it comes to techniques, various forms for capturing, storing and disseminating knowledge are recommended and will be discussed in more detail in future sections identifying these forms (e.g. communities of practice, workshops, knowledge fair, etc...).

2. Align Egypt Program KM with the CIDA HQ KM Strategy

CIDA is to be more effective in the delivery of its mandate. In designing the system to support this goal and all its developmental results, CIDA must make more effective use of its internal knowledge. This is the same at the CIDA Egypt Program level, where the KM strategy is based on the need to rely heavily on leveraging the wealth of the intellectual assets developed in the program, based on the execution of past and current projects. Implementing such strategy will lead to a more efficient use of

available resources (human, intellectual and financial) and achieving more effective results.

The vision of CIDA is to be "a knowledge-driven organization". It was thus important to raise the KM platform design to the level of the overall CIDA strategy, and pull the strategy down to the level of system design. As concluded from a telephone conference held in May with CIDA HQ, CIDA Egypt's KM strategy is in alliance with the strategy of HQ, which is also adopting a KM strategy to support its activities (Please refer to Annex III for details of the telephone conference). Both HQ and CIDA Egypt agreed that CIDA is increasingly becoming a learning and knowledge organization. This puts the Egypt Program in a pilot and a leadership position ahead of other Programs, a fact that demands a strategy which aligns with the CIDA Corporate initiative. As manifested in the May Workshop by participants, "The CIDA community has, in its 2001/11 CDPF, a harvest of 10 years, and it is time for ending a phase and handing that harvest forward. This raises the question of what kind of knowledge would benefit CIDA partners and how this should be packaged and shared". The sharing and efficient utilization of this knowledge means a better use of CIDA funds to better support development activities in Egypt.

There are several long-term and short-term objectives for CIDA Egypt which reflect the overall CIDA strategy. One of the long-term objectives is building a highly relevant CIDA Egypt Program Knowledge Package. A second one is strengthening the capacity for implementing current and future CIDA-Egypt Projects and Program.

The short-term objectives that support this outlook are:

- reaching a common understanding of KM at CIDA/PSU/Projects;
- integrating KM in various CIDA Egypt's processes and activities on program and project levels;
- gaining support of all stakeholders for the KM initiative; and
- mobilizing efforts to help and contribute to the development and successful implementation of the KM system.

It is important to highlight short-term gains as well as long-term advantages. The LL workshop in January was successful in reaching and identifying a working definition of KM. It was also clear that there is a wide conviction of the necessity of introducing and implementing a KM system at CIDA to achieve more effective and efficient program outcomes. This was confirmed by all stakeholders in the workshop, during the interviews, and in the results of the questionnaire. Despite initial confusion, the necessity of the KIM system was re-confirmed at the end of the workshop, when participants agreed on its vital need at CIDA Egypt.

KM should focus on the strategic priorities of CIDA and allow for transformations, as it is a tool for change. These priorities enable the identification of performance indicators, which serve as monitoring criteria for the implementation of the KM strategy. On the level of the field, the *FLA* and *PSU 2009 Operational Review* provided significant input about the immense knowledge and lessons learned that the CIDA-Egypt Program has, and how this knowledge is worth capturing in a complete and systematic manner. On the projects level, it is important to ensure an even commitment of all projects to the KM strategy. For new projects, this has to be part of their contractual agreement. For projects that have already ended, there is a need to capture and store as much of their knowledge as possible. This can be done based

on analysing the end-of-project reports and creating systematic project-exit documentation.

Actions taken: proposed the Egypt Program KM strategy, to align with the overall CIDA Corporate KM strategy; (synchronizing technical aspects remains ongoing.

Results obtained: CIDA Egypt KM Strategy aligned with the overall CIDA strategy.

Resources required: no additional resources were/are required; constitutes part of the ongoing assessment activities of the Technical Consultants.

Responsibility: Technical Consultants.

Date completed: ongoing activity.

Outcome/recommendation: Egypt Program KM strategy aligned with the CIDA Corporate KM strategy, the program and the projects, with CIDA Egypt program moving forward with its own KM initiative. Identifying performance indicators based on the strategic priorities of CIDA.

B. KM System Analysis, Design and Development

1. Audit existing Knowledge Assets and Systems

It was important to audit the systems and assets to identify what is available vs. what needs to be installed/initiated. There is an enormous wealth of knowledge at the CIDA program and project levels, a fact identified by CIDA and PSU staff members, project directors and officers, as well as area consultants. They all agree that there are considerable amounts of both tacit and explicit knowledge resulting from CIDA's active operation in Egypt in the last 20 years. There are also some scattered systems of managing knowledge in place. CIDA Egypt also has a high potential in information sharing and KM, which is the main objective of developing a knowledge and information management framework (KIM) that aims at facilitating the acquisition, sharing and use of Program-related knowledge and information, and supporting the capacity development activities of the CIDA Egypt Program.

Thus, it is recommended to build on these existing assets and systems and integrate them into the new KM system. Examples include:

- the LL workshop in January, which has shown that CIDA has extensive knowledge assets in the following major areas:
 - Project Design
 - Institutionalization/Sustainability Models
 - Partnership Formation, Development and Strengthening
- The periodical synergy group meetings.

However, the following areas still need development in CIDA:

- Methods used to search for information and acquire knowledge:

Searching for CIDA-related information is mainly done via the personal network, i.e. sending emails, or calling or visiting a colleague, a state that should change, once KM is institutionalized. Further, while searching on the net, the CIDA global website ranks very high, and so does looking for a hard copy of a document, searching the CIDA PSU Egypt website is not often resorted to, which points out the need for giving it a face-lift and promoting its use. Similarly, search engines such as google or yahoo have not reached their full potential use yet.

- Storing information for long-term use

This is mainly done on an individual basis, on personal drives and with no agreed upon/defined system.

- Sharing and disseminating information

Much of the information is stored in such a way that it is not easily accessible to other staff members. There are hardly any differences in the frequency of communicating technical and administrative information; neither are there any differences in the ways of communicating it, namely mainly through email, followed by verbal communication. Internal memos have become obsolete as a method of communication. A majority expressed their wish to receive fewer and more targeted emails.

There is an agreed upon need for devising less time-consuming and clearly structured methods of disseminating and sharing information and knowledge, to substitute for hap-hazard gathering of knowledge to fill in immediate gaps and cater to needs "as they arise".

- Communicating with other CIDA Offices/Projects

There is a well-defined need to formalize communication channels and establish a routine for knowledge exchange on a regular basis, using agreed upon tools.

- Lessons Learned and Good Practices

Most respondents rely on findings of evaluations in their work, and usually use lessons learned and good practices. They mainly access the latter through their personal network, something that needs to be changed through institutionalizing a KM strategy. A very effective way observed by CIDA and PSU officers as well as project staff are the "synergy meetings" held regularly. The Menya "Synergy Group Meeting" was a turnover. It was the beginning of a success story of Knowledge sharing and multiplication between projects.

- Tacit Knowledge

Most potential users of the KM system feel that tacit knowledge is not sufficiently captured in their offices, and they all feel that systematic exit interviews³ (on the individual level and on the level of the projects) would be useful, which gives a very clear signal for the need to better capture tacit knowledge within the CIDA Egypt Programme.

In summary, the most important current gaps in knowledge at the CIDA Egypt Program level are:

- inaccessibility of simple delivery models and tools developed by individual projects. Other projects and stakeholders need to be aware of them and use them (with permission, i.e. property right has to be respected) and maybe build on them;
- insufficient and non-systematic information sharing/reporting at HQ/program/project/stakeholder/grass-root levels;
- end-of-Project reports/lessons learned are not properly taken into account/disseminated; they need proper format and process;

³ Interviews determining the reasons why a departing employee has decided to leave an organization and collecting tacit information.

- lacking coordination, follow-up and recognition;
- not up-to-date/well-equipped websites, both on PSU and Projects levels; and, finally,
- slow dissemination processes.

Action taken: suitable knowledge assets and systems have been proposed, taking available resources into account. These include an infrastructural upgrade (please refer to Working Paper, ATTACHEMENT 1 for detailstraining for KMO, KMS and staff (please refer to Working Paper, ATTACHEMENT 1 for details of training recommended to date, as well as ANNEX IV for further recommendations), a CIDA/PSU webpage face-lift, an intranet and a compatible software for technically managing the KM system.

Results obtained: initiating the process of identifying intranet, web-design, hardware and training requirements which support the KM Strategy and Framework.

Resources required: undertaken as part of the ongoing assessment activities of the Technical Consultants.

Responsibility: Technical Consultants.

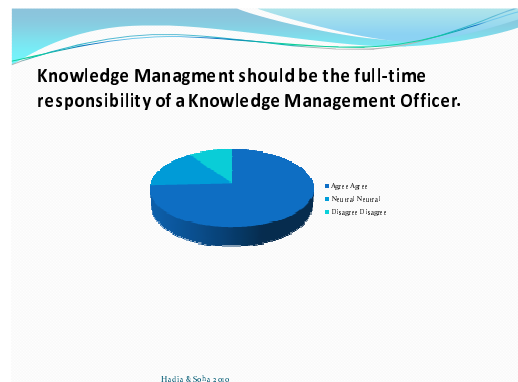
Date to be completed: end of June.

Outcome/recommendation: additional equipment have been recommended and already approved for immediate purchase, Web page is currently being re-designed and upgraded, a suitable intranet system and supporting software has to be chosen from the pool available in the market based on suitability to CIDA Egypt needs/priorities (please refer to available alternatives, ANNEX V) .

2. Assign the KM committee

The creation of a KM Committee, to assume an advisory and supervisory role, overseeing the implementation of the KIM Strategy and the ongoing management of the KM System, with the responsibility to:

- review and provide advice/feedback on the KM Strategy and the action plan for effective implementation;
- monitor the implementation of the CIDA Egypt KM Strategy;
- monitor the work of the KMO and provide guidance when needed;
- coordinate KM activities between the different stakeholders through the KMO;
- recommend developments and improvements of the KM strategy during the implementation to keep the strategy up-to-date and effective;
- review feedback from end-users of the KM system and recommend solutions when necessary;
- attend regularly the KMC meetings (at least once a month); and
- recommend feasible reward systems to encourage the effective implementation of the KM strategy on the level of the program and the level of the projects.



In general, all groups that will be affected by the KM project and all groups that are expected to use and contribute to this effort must be represented in the team. Team members should have the following characteristics:

- functional expertise;
- program/project expertise;
- ability to bring in a vision that correlates with the overall organizational-wide vision;
- representation of core CIDA activities.

At least one member should be in a position to commit the needed resources; there can be a combination between temporary and permanent team members.

Action taken: KM team selected (please refer to ANNEX VI for details on current Committee members).

Results obtained: team activated end of May, 2010.

Resources required: undertaken as part of ongoing assessment of Technical Consultants.

Responsibility: Head of Aid

Date completed: end of May.

Outcome/recommendation: Committee starts operations following May workshop to support the work of the KMO and speed up the approval process for decisions related to the KM strategy.

3. Design the KM Infrastructure

There are five main components of the KM infrastructure: a supporting culture, an effective organizational structure, common knowledge, a suitable physical environment and an Information Technology (IT) infrastructure. The design and implementation of the latter will necessitate the devotion of immediate resources, and was therefore accorded outmost priority in this process.

In the CIDA Egypt case, the Web will be a key component of the KM network. This will enable initiating a "Web Protocol-based" intranet as a primary knowledge sharing platform, which is more practical in terms of direct cost, development costs, initial investment, legacy integration and cross-platform integration. This will necessitate allocating more space through an international internet server/provider. Another important factor is the acquisition of a high-speed network, so that using an application through a web browser does not become too slow or time consuming.

The use of open systems ensures that staff and users can obtain any information/knowledge from any place at any time. Adherence to general industry standards ranging from Hypertext Mark-up Language HTML, XML, Transmission Control Protocol/Internet Protocol (TCP/IP) and Open Database Connectivity (ODBC) means that the KM system can be implemented quickly and extended and customized in the future. As already mentioned above, hardware, software, infrastructure and staff requirements are detailed in the document attached to the strategy and have already been approved by the HoA (ATTACHMENT I).

It should be noted that the intranet itself is not a KM system, but it can be built on further to create the most suitable front for one. A KM system has a different content focus, higher performance demands, and aims at having knowledge as its final output product. At a later stage and based on evaluation after deployment, a "Proprietary" intranet can be added.

It is also important to use an efficient search engine combining search strategies: meta-searching, hierarchical searching, attribute searching and content searching.

This will require the clear, well-thought-through indexing of information and knowledge. It is also very important to store data, information and knowledge using a classification system with most suitable keywords and tags. This process is called clustering (indexing). Various techniques are used like mind-mapping, thinking-aloud protocols and cluster techniques. It has been proven optimal to use 8 – 12 knowledge areas during one analysis⁴. The tagging attributes for knowledge content in the KM system include the following:

- Activities: non-exclusive grouping of processes and activities.
- Domain: based on subject matter, broad domains of expertise and skill area.
- Form: the physical representation (paper, formal, tacit).
- Type: the type of document, e.g. manual, memo, report, etc...
- Output: to which knowledge elements relate.
- Time: the creation of the output or any development of the process.
- Location: the approximate physical and logical location of the knowledge element.

The internet can be used as a medium, but the speed has to be increased, and the space allocated on the Web has to be expanded significantly.

Action taken: several steps were already undertaken to arrange for sufficient internet space and speed for the CIDA/PSU website, and to identify suitable software to support the recommended KM system.

Results obtained: available alternatives for an expanded internet presence and faster network connection were obtained by the KMO from the current CIDA internet provider, were compared and recommendations made accordingly (details available with the KMO). The same were done for the planned intranet presence (details available with the KMO).

Resources required: financial and human resources for the estimation and allocation of required internet space/speed, software and supporting hardware.

Responsibility: KMO under supervision of KM Committee in coordination with Technical Consultants.

Date to be completed: end of June – mid July.

Outcome/recommendation: continue current efforts regarding website and intranet and conclude decisions.

4. Create the KM Blueprint

Creating a blueprint is crucial to signaling commitment from top management as well as the support of CIDA HQ. Moreover, it is the means to formalizing KM contributions, specifying KM time allocation, which should be included in the ToR for professional staff⁵ and for new projects; and for institutionalizing KM into CIDA program, budgeting, HRD plans and policies, performance management systems and partner contracts.

The KM Blueprint provides a plan for building and incrementally improving the KM system. The introduction of such a blueprint increases efficiency, because flexibility is increased and complexity is reduced. It starts with the design of a KM architecture based on several

⁴ If more areas are identified, it is better to cluster more than one area under one main theme.

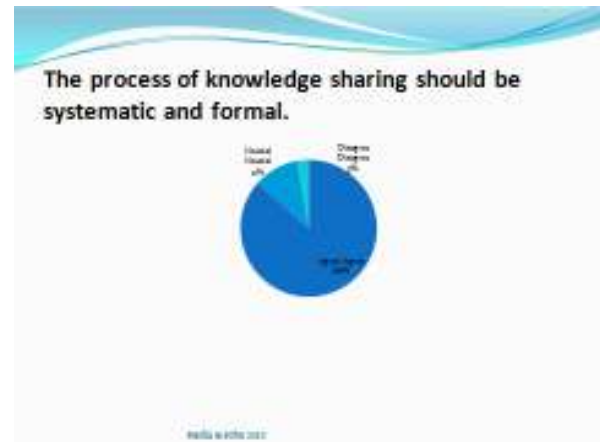
⁵ For example, UNDP allocates the percentage of time to work on KM based on staff's position.

layers specifically tailored to the needs of CIDA/PSU and determining how each of these can be optimized for performance and scalability, as well as high levels of interoperability.

The aim is to position and scope the KM system to a feasible level, where benefits exceed costs. Finally, the Blueprint will devise ways to future-proof the KM system, so that it does not become obsolete when the next wave of new technology hits the market. The outcome should thus ensure a strategically oriented KM system design.

The main objectives of the Blueprint are to:

1. develop the knowledge management architecture;
2. explain and select the architectural components;
3. allow for high levels of interoperability;
4. optimize for performance and scalability;
5. explain the repository management;
6. explain and incorporate requisite user interface needs to be explained not clear considerations;
7. position and scope the knowledge management system;
8. make the build-or-buy decision (based on understanding the trade-offs); and
9. future-proof the knowledge management system.



A draft was produced which addressed various forms to be used and procedures to be followed, to be supplemented with a “fill in the blanks” during the May Workshop. Accordingly, the collected information was compiled into the final version of the Blueprint.

Based on the final version of the blueprint it was clear that , there is a need to address the following activities:

- formalise KM contributions by all CIDA Egypt stakeholders;
- specify KM time allocation, which should be included in the ToR for professional staff⁶ and for new projects;
- institutionalize KM into CIDA program;
- identify budget considerations/limitations;
- recommend Human Resource Development (HRD) plans and policies, which encourage and reward the involvement and participation in developing and enforcing the KM system developed ;
- identify possible relevant performance management systems; and
- determine the effect on partner contracts.

These activities will all be incorporated in a detailed action plan, which will replace the blue print (which acted as a summarized proposition and a draft base for developing the steps of the strategy). The action plan will serve as the base for the implementation of the strategy.

⁶ For example, UNDP allocates the percentage of time to work on KM based on staff’s position.

The blueprint thus details the knowledge functions important to CIDA in priority order, to:

1. Create, collect and capture Information and Knowledge at Program- and PSU-levels;
2. create, collect and capture Information and Knowledge at Projects-level;
3. share and disseminate Information and Knowledge at all levels (Projects, Program, PSU, CIDA-Egypt, CIDA HQ, other stakeholders; and
4. keep information and knowledge updated.

Action taken: KM Blueprint drafted and results incorporated in the KM Strategy and Framework.

Results obtained: KM Blueprint detailing the components of the KM Strategy and Framework.

Resources required: undertaken as part of the ongoing assessment activities of the Technical Consultants.

Responsibility: Technical Consultants.

Date completed: mid-June.

Outcome/recommendation: Blueprint draft was distributed to CIDA stakeholders during the May workshop and comments taken into consideration (please refer to ATTACHMENT II for the blueprint, which served as the base for the development of a detailed action plan for the strategy).

5. Develop the KM system

It is important to have a system for prioritizing knowledge according to what creates most value for CIDA, its partners and their ultimate beneficiaries, and for selecting the most cost-effective KM tools to source and deploy the most needed knowledge. The questionnaire administered at the end of the "Knowledge for Change", CIDA Lessons Learned Workshop in January, together with the interviews held to date revealed that the KM strategy should:

- allow for accessibility and easy retrieval of knowledge;
- be clear, systematic, applicable, transparent, participatory, simple and up-to-date;
- be relevant to various demands and needs;
- be comprehensive, catering to various stakeholders, including community level, capturing both project as well as non-project activities;
- include an effective storage system;
- include a monitoring and evaluation system;
- exhibit higher reliance on human interaction than on technology and still be innovative, not labor intensive;
- have the ability to create and strengthen learning loops;
- provide an opportunity to work in groups (e.g. communities of practice);
- help participants to reach specific evidence of best practices/lessons learned;
- allow for sharing a variety of experiences and expertise;
- allow for the use of participatory, interactive and innovative methodologies;

- allow for synergies;
- have the potential and built-in mechanisms to evolve; and
- include simple show cases which can be documented in a variety of ways, including videos, pictures and posters.

a. Create, Collect and Capture Knowledge at Program- , PSU and Projects-Levels

Creating Explicit Knowledge

i. Program Reporting

There is a tremendous wealth of knowledge in the various CIDA Egypt Projects. Lessons from projects are not shared widely, but are mainly shared with the members of CIDA Embassy, in the form of annual progress reports; these do not necessarily refer to lessons learned from the field, and are not disseminated to CIDA PSU or to other projects. It is thus very important to improve knowledge sharing in a way that helps projects achieve better results and strengthens the CIDA Egypt Program as a whole, without creating an undue burden for the projects. This is partially done through the synergy meetings now. However, this needs to be complemented with documents and tools that should be stored in the KM system regularly. While some of these documents can be created on a regular basis (e.g. lessons learned), others need to be linked to current events (e.g. synergy group meetings and periodical LL workshops).

Accordingly, in agreement with the CIDA Embassy and the PSU, a list of documents to be produced on a regular basis should be compiled, agreed upon and formalized. This list should be communicated to all sections/projects, as well as posted on the website, to ensure that all team members as well as external partners are aware of its existence. The lessons learned could be extracted through the summaries/highlights of the periodic and/or end of project reports sent to the Embassy. This could be done by the KMS at the beginning and then eventually be taken over by the focal points of the projects. Reporting on workshops, conferences or other current events should also be formalized. A very good example is the last LL workshop, which included a report and a CD. A list originating from the online questionnaire was refined in the May Workshop and includes all the documents/resources projects are willing to share with and/or would like to have from others

During the May Workshop "Creating a Culture of Learning and Knowledge Sharing"- Knowledge and Information Management (KIM), participants were requested to examine the list of documents and decide on the most important three to five documents that they will need/want to share with others and/or post on the website. Other documents or media, such as videos, not listed in the blueprint, were added under "others." Using a Dotmocracy, the most important documents were listed as follows:

Documentation

Document	No. of Votes
Lessons learned	14
Thematic analyses	13
Evaluations	12
Best practices	10

Annual Reports	10
Case Studies	9
Strategic papers and frameworks	8
Assessment findings	7
Others (e.g. admin docs, synergy group reports)	7
Technical reports	6
Tools	6
End of projects reports	3
Workshop reports	2
Power point presentation	1
Monitoring reports	1

In addition, each participant filled out a template with three to five documents that he/she is willing to share with others (please refer to ANNEX VII for Template). These were collected by the Knowledge Management Officer (KMO), thus providing initial input for the new website database.

Action taken: a form to be filled out by each section addressing theme, type of documents that can be made available, and regularity/dates was compiled during the workshop and will be refined during the collection process.

Results obtained: a preliminary list of documents to be produced by each section on a regular basis, to be refined as the inputting of documents proceeds.

Resources required: the form was prepared by the Technical Consultants while the documents will be collected and uploaded by the KMO; time needs to be invested by each section/project to submit the agreed upon documents.

Responsibility: management, in cooperation with each section/project; KMO to collect and upload the documents. Follow-up by KMO.

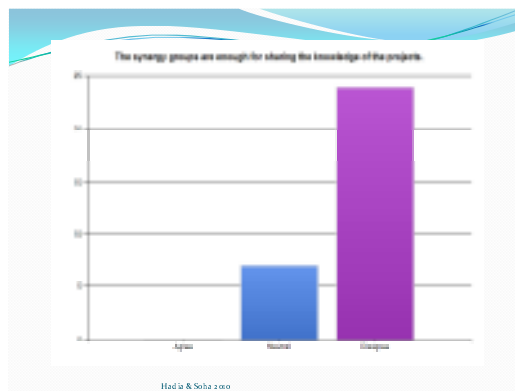
Date to be completed: pending the readiness of the website and the intranet.

Outcome/recommendation: start with documents/resources which projects are prepared to share, upload on the website, then gradually add under the guidance of the KM Committee and in cooperation with the project focal points. Projects' focal points are encouraged to take a major part in this process, in coordination with their project directors. The CIDA Program Workshop could provide an excellent forum for this activity.

ii. Creating Communities of Practice related to Cross-Cutting Themes

2. Creating Communities of Practice

To improve the dissemination of knowledge between the PSU, Projects and external partners, it is recommended to create Communities of Practice related to the cross-cutting themes, to promote collective learning and develop a shared repertoire of resources, experiences, stories, tools and ways of addressing recurring problems. The synergy groups can be a way to activate this component of KM. Also the Capacity Working groups, which have been running for four years now, are another effective example that can be enforced and encouraged., For



example, this can include reports on education and SME synergy groups/telling the story/schedules of upcoming CIDA and other development events in Egypt or in the region.

CoPs can use the websites as a knowledge repository. In this case, it is crucial to ensure that they do not become static websites with minimal new content added. Thus, interactivity can occur via email alerts to all members with updates on new web content and CoP activities. The same can be done with the Capacity Development meetings.

Accordingly, the site can become a good repository for knowledge products developed by the community, such as reports, policy notes, best practice papers and newsletters. Best methods for generating participation were identified during the May Workshop as:

- spreading word of mouth;
- soliciting the participation of donor sub-groups;
- sending e-alerts;
- providing e-links; and
- highlighting the value added.

Communities of Practice may address the following priority areas:

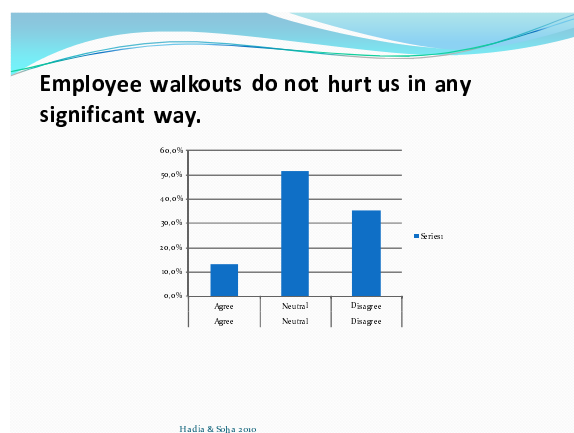
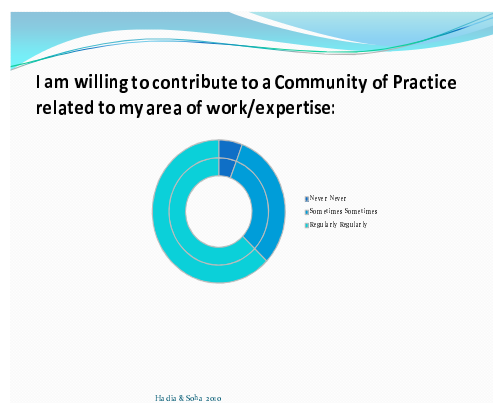
- CCTs;
- PSD/SME;
- M&E;
- capacity development; and
- education.

Workshop participants agreed on the necessity to create a user-friendly e-system which includes chat and discussion groups, meets periodically as well as through e-communication, and is thus capable of creating networks/synergies in the chosen areas. While at its beginning the system should be limited to the CIDA community, including HQ, it should eventually grow to become open, while moderated.

Action to be taken: institutionalizing the synergy group meetings and the Capacity Development Working Group (CD) and create sub-divisions thereof as well

Results expected: regular meetings with results feeding into the KM system. This can be the responsibility of the synergy meeting coordinator, who is selected on a rotating basis. With respect to the CDs, it would be a rotating responsibility as well. The reports of the synergy meetings and the CDs of workshops/meetings and any other related documents should be submitted to the KMO/KMS for inclusion on the web site, the intranet and any other tool, as appropriate.

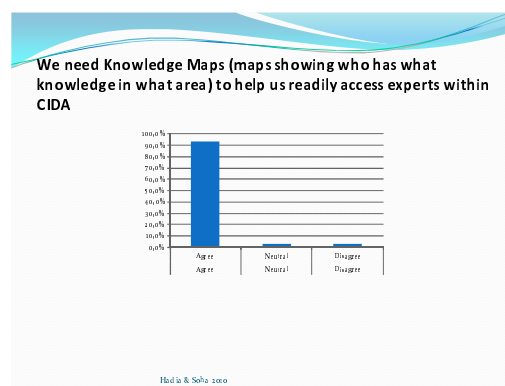
Resources required: regular time allocated to this activity.



Responsibility: CIDA Program Officer; project managers, FPs.

Date completed: ongoing activity, to begin when the website and the intranet are functional.

Outcome/recommendation: a set schedule on a yearly basis for the meetings, preferably to be attended by the KMO/KMS.



Creating Tacit Knowledge at Program-Level

i. Shadowing or Mentoring

Tacit knowledge is not being captured sufficiently. Best practices show that “**shadowing**” and “**mentoring**” are among the most successful ways of transferring or recreating tacit knowledge. Shadowing refers to a process by which less experienced/new staff observes more experienced staff in their activities, to learn “on the job”. The “protégé” should have the chance to create a dialog with the “mentor” and understand the underlying causes of doing things in a certain way.

Action to be taken: the Egypt program and the projects to agree on a formal process to be followed when a new member joins the team (although this may currently be practiced, this process is not yet formal).

Results expected: facilitated procedure of transferring knowledge from experienced to new staff members.

Resources required: commitment on part of current staff.

Responsibility: management and administration (at program and project levels), to formalize process; all team members, wherever applicable.

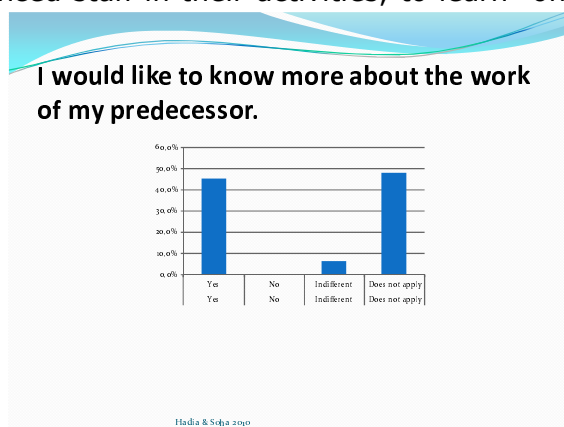
Date to be completed: pending feedback of management and administration.

Outcome/recommendation: Should be included in the job descriptions of team members and reflected in the performance appraisal.

ii. Knowledge Maps to identify expertise

Most team members use emails or personal communication to collect or disseminate knowledge. It is often not clear who has which knowledge, given the decentralized nature of the CIDA Egypt Program, working at the Embassy-, PSU- and Project-levels. To address this, Knowledge Maps, which are maps showing who has what knowledge in what area can be created following the example of the Yellow Pages, i.e. through providing a listing of staff members under headings of:

- Areas of specialisation;
- Experience within the CIDA, the CIDA Egypt, Egypt in general, the Region;
- Skills;
- Languages spoken.



These should be made available in hard copy as well as posted on the Intranet (and possibly the website, if it is agreed to make such a list available to external partners as well), where it would be possible to cross-index the list of staff members according to the four headings (and sub-headings) provided above. Furthermore, it is crucial to keep the Knowledge Maps up-to-date, and assign this clear responsibility.

Action to be taken: prepare knowledge maps in hard copy and post on intranet, to be filled out by program/project members based on areas of specialization obtained during the May Workshop (please refer to ANNEX VIII for details).

Results expected: knowledge of human resources available within the CIDA Egypt Program at various levels (past and current).

Resources required: time to compile the Map and update it when staff profile changes.

Responsibility: administration and all CIDA-Egypt employees; follow-up by the KMO.

Date to be completed: ongoing process, pending feedback of administration, projects and KMO.

Outcome/recommendation: Distribute forms at Embassy-, Program-, Projects-, Advisors-levels and prepare/upload/disseminate results.

iii. Systematic Exit Interviews

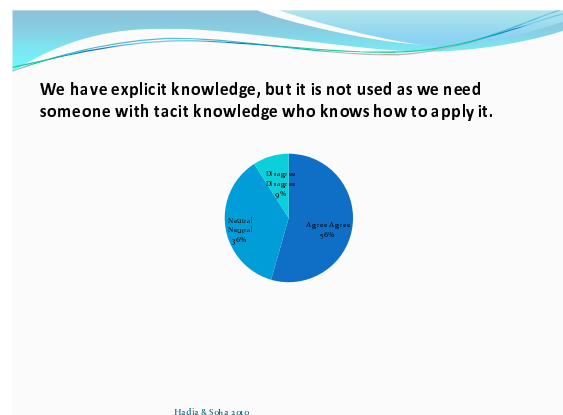
Systematic Exit Interviews are usually a richer source of objective feedback compared to information obtained from employed staff, who are less liberated in their answers. It is recommended to institutionalise the conduct of such interviews; in doing so, it is important to note that good exit interviews should yield useful information about the CIDA Egypt Program, including:

- assessing various aspects of the working environment;
- evaluating processes and systems;
- capturing project-related tacit knowledge of the individual;
- appraising management; and
- determining the quality of the program/projects in terms of its relationship with its staff, counterparts and the general public.

Specific questions may include:

- reasons for leaving the job and level of satisfaction with it when doing so;
- recommendations for improving the working environment;
- recommendations for improving inputs to and outputs from the job;
- methods of improving the intrinsic and extrinsic rewards of the job;
- lessons learned on the job;

Group discussion during the May Workshop highlighted the importance of considering the level of effort involved in conducting such interviews, and the importance of bearing in mind the role of each individual when deciding on the scope of such interviews. Accordingly, options included both individual interviews with "key" partners/individuals and/or interviews conducted by a project committee identified at project inception. Furthermore, the



importance of mandating "exit interviews" at the close of project was highlighted.

Action to be taken: agree on formal process and design the interview questions/management/process to be followed when a member leaves the team.

Results expected: facilitated procedure of capturing knowledge from departing staff members.

Resources required: time to prepare and conduct interviews as early as possible.

Responsibility: management and various section chiefs, to formalize process; all team members, whenever applicable.

Date completed: ongoing activity, pending feedback from management and section chiefs.

Outcome/recommendation: sample questions for exit interviews are presented in ANNEX IX.

b. Create, Collect and Capture Knowledge at Projects-Level

Creating Tacit Knowledge at Projects-Level: Systematic Project-Exit Documentation

When projects close, much of their knowledge leaves with them. Thus, it would be very useful to conduct Systematic Project-Exit Documentation when a project approaches its end, to draw lessons learned related to the management of the project within the CIDA Egypt Program, as opposed to lessons learned from the field. As the case with systematic exit interviews with departing employees, project-exit documentation should assess:

- various aspects of the working environment;
- processes and systems;
- management; and
- the quality of the program in terms of its relationship with the project.

As discussed in the May Workshop, project exit interviews can take three forms:

- Interviews conducted with all stakeholders by a neutral party, thus requiring maximum effort;
- Captured results of team discussion, thus requiring moderate effort; or
- Extracted from end of project reports, thus requiring minimum effort.

While the latter option maybe the most suitable one for currently ending projects, the first and second options may well be considered for newly starting projects.

For starting projects, a section on the project's contribution to KM should be in the ToR. It should describe how each project is obliged to create, store and share its knowledge with CIDA, PSU and other projects.

- How projects can contribute/have contributed to the creation of knowledge;
- How projects have benefitted/can benefit from available knowledge;
- What projects can learn/have learned from similar projects in other countries/in Egypt;
- Specific recommendations for cooperating with the Program/PSU/other Projects;
- Regularity of knowledge exchange required at various levels.

Action to be taken: agree on formal process to be followed when a project ends and/or begins. An exit interview should be conducted with the project director and major team members of the project. Exact format, timing and process should also be identified.

Results expected: lessons learned based on an analysis of strengths and weaknesses of the program.

Resources required: time to prepare the documentation.

Responsibility: management and KMO.

Date completed: ongoing process, pending feedback of management, projects and KMO.

Outcome/recommendation: The need for systematic exit interviews should be included in the RFPs of new projects. For old projects, information should be extracted from the end of project report by the Program Advisors and/or the KMS.

c. Share and Disseminate Knowledge

The Intranet

Many staff members save their documents on the shared drives of their offices; however, there are no shared drives between the Embassy, PSU and the Projects. A very efficient alternative is the Intranet, which is hardly used to date. An additional benefit of using the intranet, which is web-based, is the accessibility of documents from the field or from home. It is also suitable in case of expansion, change of ownership, or any developments that can take place in the future. The CIDA/PSU website can serve as the front page of the intranet, as well.

Action to be taken: structure the intranet, upload documents and provide access to staff members. Several options are investigated with respect to software (as mentioned above, please refer to ANNEX VI for details).

Results expected: increased accessibility of documents.

Resources required: financial resources to structure the intranet and upload documents; possibly introduce the use of Lotus Notes or similar programs.

Responsibility: KMO, IT and administration.

Date completed: ongoing process, pending feedback of HQ, management and IT.

Outcome/recommendation: A comparison between MS Exchange and Lotus Notes has been conducted. MS Exchange seems to be the better option so far. Final decision is to be taken based on consultations with HQ (please refer to ANNEX VI for further details hereto)).

b. The Website

An updated and continuously populated website can be of great value in improving access to knowledge about the work of the CIDA HQ, the CIDA Embassy, the PSU and CIDA projects. Currently, the website lacks maintenance. Further areas for improvement include, but are not limited to:

- List of CIDA Projects in Egypt is not complete.
- Chargeable Services were last updated in June 2005.
- Clickable Map: a very useful resource which needs to be completed and updated regularly;
- FAQs: which are very valuable sources for providing answers in a quick manner and avoiding wasting energy in searching: has no single entry to date.

- Newsletters: latest one dates to October 2006. Also: subscription to newsletter does not allow skipping American States.
- Articles: such as the one on knowledge management, are out-dated.
- Telephone Numbers out-dated.
- Change of address (changing floors) has not been mentioned.
- Calendar of Events: Last entry dates back to February 2009. Needs to be updated regularly.

Furthermore, the site should include up-to-date information on the following:

- The CIDA Egypt Program, and how the Embassy, PSU and the Projects are connected.
- The Knowledge Maps of CIDA staff, as described above.
- Emails of staff;
- Abbreviations and acronyms used by the CIDA Egypt Program and various projects.

In addition to addressing the above issues, it is crucial for the website to ensure two main elements: search engines that are efficient/well thought-out navigation structure, and a continuous flow of new information.

- Well Thought-Out Navigation Structure and effective Search Engines (as explained above in detail): their current scope needs to be fully clear to users, which is not the case to date. Relevance and timeliness of information must be clear with a simple search. Unexpected results should be noticeable. A search should result in hits immediately. Tags should include key words in the files, using summaries, showing the date of the document, and link to author's profile.⁷
- Continuous flow of information: updating information regularly is essential to ensure that users will keep coming back. Clear documentation of the date of site update is essential for reassuring visitors of the newness of available information.

Action to be taken: updating the website and populating it with knowledge created and collected on a regular basis.

Results expected: increased use of the website and facilitated access to knowledge.

Resources required: time dedicated to updating the site regularly.

Responsibility: KMO, in coordination with all team members.

Date completed: ongoing process, currently undertaken by the KMO.

Outcome/recommendation: continuation of currently effectively undertaken KMO efforts to face-lift the website and populate.

C. Deployment

1. Deploy using the Results-Driven Incremental Methodology

The May workshop was organized to discuss the details of the KM Strategy and Framework, and solicit feedback from various stakeholders. Following the workshop, the KM strategy and action plan were updated. Deployment will start upon receipt of feedback, and an incremental operation of the system can then be introduced. The recommendation is to start implementation on two levels:

⁷ Vorbilder im Netz, p. 70.

1. Level one: on all projects, where minimal documentation will be requested, limited to those agreed upon in the May Workshop.
2. Level two: on two projects, BDSSP and EEDP, which will serve as pilot projects due to their advancement in the area of Information and KM.

Action to be taken: ensure the full introduction and operation of various elements of the KM strategy and framework.

Results expected: feedback from various stakeholders.

Resources required: time for assessment and feedback from all stakeholders.

Responsibility: Technical Consultants, in coordination with all team members and project focal points.

Date completed: ongoing process, pending feedback of various team members and project focal points.

Outcome/recommendation: KM committee should speed up feedback/approval process to ensure fast deployment.

2. Manage Change, Culture and Reward Structures

The January LL Workshop and the May Follow-up Workshop are milestones in the change and culture structures. All the actions requested to be taken above are complementary and assist the change and adaptation of the new system/culture. It is important to keep in mind that implementing the KM Strategy is a continuous effort in convincing and creating awareness. Promoting the implementation of the KM Strategy should ideally thus be based on the following two pillars:

1. **perceived usefulness:** KM is considered useful, if it is kept simple and does not require too much additional work; the most important factors influencing uptake is the ability of the KM Strategy to meet the actual needs of its end-users. Ideally, personal benefits must continuously be highlighted, using tailored channels to cater to the needs of various stakeholders. Publishing follow-up messages on the website and including these in the newsletters should be done on a regular basis; most important factors influencing uptake is the ability of knowledge products to meet needs of end-users.
2. **perceived management support:** this is mainly done through engaging stakeholders for the KM solution on a regular basis, keeping them regularly updated, and creating and maintaining procedures and policies on how the system will be implemented; together with the entire management team. Moreover, integrating indicators into the appraisal targets.

Therefore, it is recommended to add incentives for the staff to participate actively in the KM deployment process. This may be in the form of intrinsic rewards like recognition in the newsletter, for example. In addition, such involvement should reflect in the performance evaluations of staff members, as well. It is highly recommended to add a component on KM participation/contribution in the annual performance evaluation forms. The initiative should make a distinction between ongoing projects for which the program does not have too much leverage to make them add these things versus new projects where the TORs in their contract could mention it.

1. Providing feedback documenting the usefulness of the KM system in easing work processes and tracking its cost effectiveness;
2. Including KM in the job description/ToR of all members and rewarding its fulfillment;
3. Rewarding KM contributions through acknowledgement in its various forms.

Questions posed during the May workshop pertained to how to best sustain the momentum on an individual, on projects' as well as the Program's level. This question yielded the following propositions:

On the individual level:

- simplification of additional work associated with KM, for example through:
 - the provision of forms that are easy to fill out;
 - the installation of a user-friendly system; and
 - the establishment of clearly defined deadlines;
- provision of capacity building; first to the KMO and then to the KMS and the FPs. This will be done in collaboration with the IT specialist. It should then be feasible to cascade this training by the KMO and the FPs to other staff members at a later stage. This will both facilitate and encourage the participation in KM;
- inclusion of criteria to evaluate KM efforts in the performance appraisal of employees; and the
- extension of appreciation and acknowledgement for additional KM efforts exerted by employees;

At the projects' level:

- KM requirements should be explicitly stated in the ToRs of new projects, and reporting requirements should be a clear part of contracts/agreements;
- monitoring reports should include a section on KM what will they monitor?, completed by advisors;
- project directors and focal point should be encouraged to organize events to promote the knowledge management culture;
- recognition of project achievements in the area of KM should be announced on the website and in annual meetings/conferences; and
- general guidelines should be provided to projects interested in developing their own websites.

Action to be taken: Decide on and adopt a promotion, awareness-raising and incentive system to be introduced and widely disseminated on the website and in regular newsletters.

Results expected: Built-in incentives soliciting the participation of various stakeholders in the establishment and maintenance of the KM system, and ensuring its continuity.

Resources required: suggestions and recommendations from management and administration.

Responsibility: Head of Aid.

Date completed: ongoing process, pending feedback of HoA.

Outcome/recommendation: Various rewards and incentive systems should be introduced. Examples are: recognition on the web site, award systems for the whole

project (e.g. more chance for possible extension, when requested at a later stage when project is ending), capacity building opportunities, reflection on individual performance appraisal. It is also recommended to organize an annual knowledge fair to harvest the knowledge on a yearly basis. A report should then be produced and uploaded to the KM system's appropriate database.

D. Evaluate Performance and Incrementally Refine the KMS

Following the deployment of the KM Strategy, an evaluation of the implementation of the strategy should take place over 2 – 3 months, finally culminating in the introduction of adjustments and changes to refine the system. Documentation of the KMS, including recommendations for improvements and institutionalization will be provided.

Monitoring will be done through periodical communication/reporting between the KMO and the KMC, in general, and the TCs, in particular. (refer to the Action Plan for time frame). The Technical Consultants will review the reports and provide feedback accordingly.

The evaluation exercise will be conducted through three mechanisms:

- An online questionnaire directed at users pilot and all project FPs of the system in the trial period.
- Interviews with the focal points of the projects, the KMO and the KMS.
- Monitoring and evaluation of the performance indicators identified in the action plan.

Action to be taken: monitor and evaluate the KMS.

Results expected: refinement of the KMS based on M&E.

Resources required: feedback from all involved stakeholders.

Responsibility: Technical Consultants with support from KM committee, especially the KMO and the KMS.

Date to be completed: to be determined, pending feedback on KIM Strategy and Framework.

Outcome/recommendation: Final KIM strategy.