Knowledge  
Management  
Strategy

Outline for approval

*A knowledge management strategy is a plan of action that outlines how an organization will manage knowledge to improve efficiency and productivity. The main purpose of this document is to briefly describe the approach to design the UNCDF knowledge management strategy aligned with the vision and the strategic framework (*UNCDF Strategic Framework, 2022*).*

I. Vision 3

II. Map Existing Knowledge and Gaps and Identify Knowledge Engagement Needs 4

III. Define Goals and Objectives 5

IV. Governance 5

V. Set up and Measure a Knowledge Engagement Strategy for Success 6

VI. Action Plan 7

VII. References 15

# Vision

The UN Capital Development Fund (UNCDF) will continue to strengthen its position as a recognized thought leader and advocate for innovative financing to reach the last mile.

In order to accomplish this goal, UNCDF will foster innovation, incentivize corporate learning, integrate gender intentionality, and facilitate the replication of successful models.

Knowledge Management (KM) can be defined as a set of practices, processes and tools that enable an organization to generate, systematize and share knowledge both internally and externally.

The main goal of the knowledge management strategy is to connect "knowledge nodes" or people with knowledge and people who want to learn, so that the organization as a whole can learn more.

Knowledge sharing must become a desire, not a requirement.

This is accomplished:

* By creating a transparent and creative work environment that encourages employees to feel safe, recognize the value of their knowledge and its value to the organization, and develop a knowledge-sharing mindset so they can continue to learn through knowledge-sharing.
* By establishing a culture of knowledge sharing and making sure that people know what they need to know when they need it.

Knowledge Management is not about the technology that enables knowledge sharing, it’s about institutionalizing knowledge transfer.

This is accomplished:

* By sustaining information and knowledge creation across practices and geographical locations.
* By helping UNCDF staff organize, share, and find existing information within the organization.
* By increasing collaboration and knowledge sharing inside the Agency and with other UN agencies or external entities.

# Map Existing Knowledge and Gaps and Identify Knowledge Engagement Needs

Knowledge is a complex concept and different typologies have been developed, and the only consensus seems to be the notion that knowledge is more than just mere data and information. Data can be considered as the basis for creating information and knowledge (Greiner et al., 2007)

In today's world, knowledge is all about adding value, and it will serve as the basis for the remote and hybrid work models that will define the workspace of the future.

Sharing, transferring, and accumulating knowledge will be a daily occurrence for each employee. Prioritizing knowledge transfer will improve an organization's knowledge flow, and the increased value of information will justify investments in repository systems for knowledge management.

However, UNCDF must first determine what knowledge is already present within the organization, where gaps exist in that knowledge base, where that knowledge resides, and—whenever possible—what information is missing before putting into practice a knowledge management strategy.

* 1. KM Map and Flows
  2. Identify Knowledge Engagement Needs
  3. Tools
  4. Knowledge Management Team

# Define Goals and Objectives

It's important to set objectives that can be measured and are fully aligned with corporate goals, this will ensure that all teams are working towards a common goal.   
  
As reflected in the Strategic Framework: “UNCDF will continue to build its role as a recognized thought leader and advocate for innovative finance to reach the last mile. To drive innovation, incentivize corporate learning, integrate gender intentionality and facilitate replication of effective models, a digital knowledge management system will be reinforced to strengthen its internal information and data systems.”

Objective #1: Generate thought leadership knowledge and advocacy on innovative finance for the last mile.  
  
Priorities (TBD)

Objective #2: Increase organizational effectiveness and efficiency by sharing knowledge across teams and projects.  
  
Priorities (TBD)

# Governance

* 1. Ownership and Intended Use  
     Identify who ultimately owns and is responsible for the creation, storing, sharing, and transferring of knowledge.
  2. Roles and Permissions  
     Determine who is responsible for what and who has permission to do what across the organization in terms of what they can and cannot do.

# Set up and Measure a Knowledge Engagement Strategy for Success

It is essential to define the goals and KPIs for the purpose of evaluating the strategy. Baseline KPI measurements should be used to gain an understanding of the strategy's impact so that changes can be monitored, and the strategy's success can be demonstrated using metrics.  
  
Planning actions to help build a culture of active engagement with knowledge and setting up a culture of active knowledge engagement will help UNCDF to move from just being aware of the value of knowledge transfer to having a deeper understanding of it.

# Integration of Language Learning Models

The merging of Knowledge Management (KM) practices and Large Language Models (LLMs) represents a powerful opportunity to unlock the full potential of organizational knowledge.

In today's data-centric landscape, knowledge is a strategic asset, making KM essential. The fusion of KM practices with LLMs like GPT-4 offers a potent synergy for unlocking organizational knowledge potential. KM facilitates innovation and efficient decision-making by organizing data but faces challenges like information overload. LLMs can efficiently process vast texts, generate content, and provide 24/7 access, yet issues like quality control, context understanding, and data privacy need addressing. Balancing automation with human oversight and ensuring data security are vital for leveraging KM and LLMs to enhance organizational efficiency and innovation.

UNCDF can leverage Large Language Models (LLMs) for knowledge discovery, content creation, internal communications, and collaboration, while ensuring data security, ethical use, and continuous learning.

# Action Plan

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TBD** | | | | |
| **Call to Action** | | | | |
| **Activities** | **Tasks** | **Description** | **Responsible Units** | **Outputs** |
| Activity #1: Understand how knowledge contributes to organizational success. | Step #1: Organize webinars about KM per regions/units, with all staff | Present and explain knowledge management and its importance for UNCDF.  Develop ownership stake and get people inside the organization to show interest and help identify key knowledge concepts that are important to the organization's performance and success.  Explore the knowledge needed to spearhead initiatives and drive strategic decision-making in order to:   * Facilitate decision-making capabilities. * Build a learning organization. * Stimulate a cultural change and spearhead innovation. | Directorate  PPC  PMSU  Practices | * First measurement of the extent and nature of collaboration among users. * Level of processes and systems adoption. * Definition of what knowledge is for UNCDF |
| 1. Step #2: Create Survey to gather feedback | Collect the feedback and ideas that will lead to getting buy-in from the various units. | Directorate  PPC  PMSU  Practices | * Feedback collected from UNCDF personnel. * List of actionable suggestions. |
| Activity #2: Determine current state (through interviews and process reviews) | 1. Step #3: Identify key KM actors | * Identify users (e.g. demographics, business units, structure, roles). * What information do they need daily? * How do they connect and communicate currently? How would they like to do that in the future? * Are there established thought leaders? If not, what is preventing that? * Do they like sharing expertise? If not, what is stopping them? * Are there any informational and/or functional silos within the organization and what is the root cause for them to form? | PPC  PMSU  Practices | * List of KM practitioners // actors in the organization. * List of thought leadership actors in the organization. * Measurement of the extent and nature of collaboration among users. * Level of processes and systems adoption. * Balance between content accessibility and confidentiality protection. |
| 1. Step #4: Identify key KM processes | * What are the main business processes for the organization, as well as for each practice // unit? * How are the processes instantiated, applied, and followed? What are the gaps, and where can they be improved? * Does staff perceive the existing processes as efficient or more cumbersome than necessary? * How are the processes being followed in “real life?” * Are there established roles and well-defined staff to fill these roles in each process step? | PPC  PMSU  Practices | * List key processes that can benefit from optimization and automation. * List “Unofficial” processes (e.g. google drive). * List processes that are not being followed and measure process adoption. |
|  | Step #5: Identify key knowledge nuggets | * How “fresh” is our content and what are the obstacles for keeping it current? How much does our staff trust the content they find on internal systems? * Where is this content housed? How is it organized and accessed? Is there a defined access control in place? Are there security and confidentiality concerns that need to be addressed? * Do people collaborate in contributing new content? Are there approval workflows with established roles in place or are they not needed? * What are the current procedures for knowledge retention when staff leaves? * Do you need to collaborate or share some of our content with external audiences? * How has the content been enhanced (with tags, formatting, etc.)? * Again, what silos exists and why? | PPC  PMSU  Practices | * List what information sources should be integrated. * List content types and sources that should be protected and to what level. |
|  | Step #6: Review Organizational Culture | * Is knowledge sharing fostered by our company’s culture? Are there incentives for thought leadership contributions? * Do people like to share, or do they prefer to keep their intellectual property to themselves? * What about sharing across business units? | PPC  PMSU  Practices | * List of benefits to counter the “What’s in it for me?” factor that hinders sharing. * Specify solutions to address the “I don’t know where/how/what to share and who can see it” factor. * Define leadership support to address lack of corporate support. |
|  | Step #7: Review Technology Stack | * Is there an existing IT architecture plan or a Digital Governance? What is the level of integration between systems, e.g., user account management, content and document management, intranet, search, taxonomy management, marketing and finance applications, etc. * What are the technology development and maintenance capabilities of the organization? Is there dedicated IT staff? What are their skills? * Where in their lifecycle are current systems? Are any of them planned to be sunset? Are any new ones already in the procurement process? * What are the cost factors? Do license restrictions cause inefficiencies? * Is there an access control plan for the full technology ecosystem? If not, what issues does that cause? | PPC  PMSU  Practices | * List IT capabilities in the organization. * Define preferred technology stack. * Review existing technology ecosystem and integration capabilities. * Technology biases. * User management. * Organization-wide search tool. * Advanced technologies (semantic web and machine learning/AI). |
| Activity #3: Design Knowledge Map Conceptual Framework | Step #1: Identify key concepts  Step #2: Interviewing subject matter experts  Step #3: Establish Related Ideas  Step #4: Link the Ideas Together   1. Step #5: Describe the Relationships 2. Step #6: Design Map | Identify the key concepts related to topics. These will be the building blocks of our knowledge map. To identify the key concepts:   * What are the most crucial knowledge topics? * What are the main categories that need to be analyzed? * What are the most pressing issues to pay attention to?   Define critical concepts before the knowledge-gathering process to provide direction and structure. Gather all relevant information:   * Researching. * Interviewing subject matter experts. * Collecting data. * Inputting topics and nuggets into knowledge map. | PPC  PMSU | * List of critical knowledge nuggets. * Taxonomy of topics or KM nuggets that need to be analyzed. * A Conceptual Framework Knowledge Map. |
| Results | *Corporate Buy-in, Value Proposition, KM Direction, KM Map* | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TBD** | | | | |
| **Develop KM Strategy** | | | | |
| **Activities** | **Tasks** | **Description** | **Contributors** | **Outputs** |
| Activity #1: Define Critical Corporate Knowledge | Step #1: | Senior management and other "in-the-know" personnel must be consulted when setting KM priorities to understand the organization's short- and long-term goals.  Impending retirements, organizational churn, and other factors can create knowledge gaps and hazards. | Directorate  PPC  PMSU  Practices | * Incorporate UNCDF’s definition of Knowledge. * Validate who owns the required knowledge, and how can it be accessed. * Validate at what point the knowledge is needed throughout the different processes. |
| Activity #2: Create Governance Framework | 1. Step #1: Define Roles and Responsibilities | * Set of defined corporate expectations for how knowledge will be managed in the organization, including ownership of important knowledge domains and Knowledge Management standards or rules. Knowledge Management Plan sets project expectations. * Performance management of KM—monitoring and measuring the application of KM through KM metrics linked to reward and recognition, to ensure that people are delivering on their accountabilities and applying the system as expected, to identify the need for new interventions to improve the KM system, and to ensure a continuous improvement in the organization's ability to manage strategic knowledge. * A Knowledge Management support team, reference material, and training. | PPC  PMSU  Practices | * Define roles and responsibilities of KM practitioners // actors in the organization. * Define focal points for each of the KM domains in the organization. * Define KM Metrics, and monitoring and measurement tools. * Measure the level of adoption of different processes and systems across the organization. * Establish a balance between content accessibility and confidentiality. |
| Activity #3: Align KM to Corporate Priorities and Functions | Identify key KM processes to align them with corporate priorities | * Aligning an organization's expertise with corporate goals. In this view, knowledge management entails enhancing the development, dissemination, and commercialization of expertise and information through a corporate lens. | PPC  PMSU  Practices | * Define key processes that have wide adoption in the organization. * Identify key processes that can benefit from optimization and automation. |
| Activity #4: Scope and Prioritize Opportunities | Identify key knowledge nuggets | * Decide How scope and opportunities will be decided. Reflecting on the most important factors for realizing the organization's potential, then devising a tool to measure how each aim will get the organization there. | PPC  PMSU  Practices | * Identify tool to decide scope and opportunities. * Create a Roadmap * Set up a tracking tool |
| Activity #5: Create Business Case and Budget |  | **Needs:**   * Business case include a summary of the business goals and an overview of the KM Strategy’s proposed approach. * Establish the vision, goals and objectives, as well as the set of activities and outputs that must be attained. * Set success criteria and stakeholder requirements. * Assign focal points and team leaders to develop KM Strategy. * Develop a budget to meet demands. | PPC  PMSU  Practices | * Prepare a business case to ensure strategy’s recognition as a key organizational framework. * Include a budget, timeline and success KPIs to ensure accountability and implementation. * Develop KM Strategy as an organizational requirement to attain corporate objectives. |
| Results | *KM Strategy and KM Roadmap* | | | |

# References

Greiner et al., 2007, A strategy for knowledge management, VOL. 11 NO. 6 2007, pp. 3-15, Journal of Knowledge Management

UNCDF Strategic Framework, 2022, UNCDF Strategic Framework 2022-2025, [Link](https://www.uncdf.org/article/7489/uncdf-strategic-framework-2022-2025-illustrated-version)