



Canadian International
Development Agency

Agence canadienne de
développement international



*Your knowledge
matters: share it!*

Knowledge Sharing

Methods, Meetings and Tools

November 2003

Canada

Knowledge Sharing

Methods, Meetings and Tools

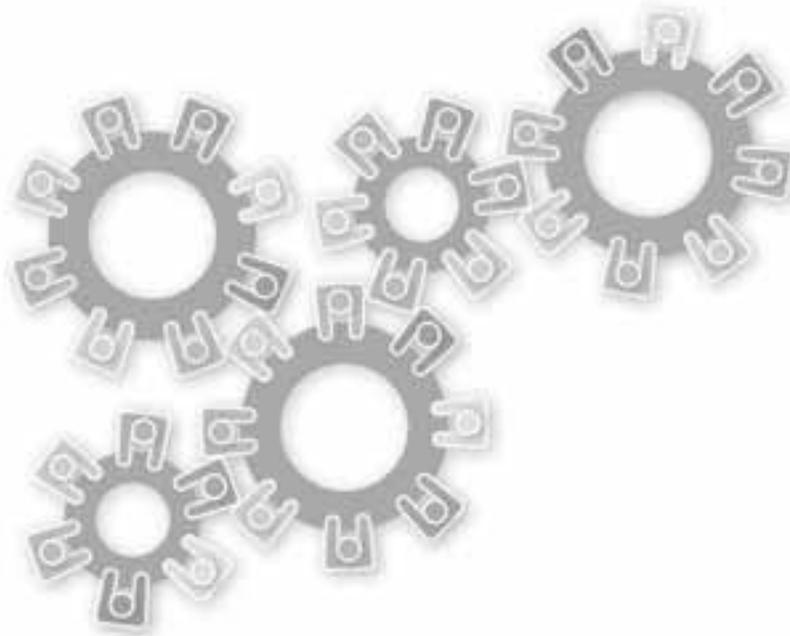


TABLE OF CONTENTS

INTRODUCTION	1
KNOWLEDGE SHARING METHODS	3
• Peer Assist	5
• After Action Review	6
• Storytelling	7
• Mentoring	8
• Coaching	8
KNOWLEDGE SHARING MEETINGS	9
• Communities of Practice (Networks)	11
• Forums and Meetings	12
• Workshops, Training and Seminars	13
• Knowledge Fairs	14
TOOLS AVAILABLE THROUGH ENTRE NOUS	15
• Extranets	17
• Expertise Locator Systems	18
• Electronic Databases	19
• The Magazine	19
REFERENCES	21
• References	23
• Other Interesting References	24
Annex - JOB AIDS	25
• Career Plan	27
• Work Plan	28
• Roadmap for Coordinating Events	29
• How to Communicate and Work with Your Colleagues in the Field	30
• How Do I Find My Way Around IMTB?	31
• Employees' Knowledge Sharing "CUE CARD"	32

INTRODUCTION

Why this handbook?

Knowledge Sharing: Methods, Meeting Places and Tools presents a selection of easy ways to help you have better access to the knowledge you need to do your work. We invite you to step outside your usual routine and engage in the cross-fertilization of ideas with your peers. The methods described here are simple to use and can easily be built into the way you work. Many of you may well work this way already without calling it 'knowledge sharing'. These tried and true processes will help you in your search for fresh, creative solutions to the challenges you face every day.

Join us in this initiative!

The Knowledge Management Team is here to support you as you seek ways to learn from your colleagues and share what you know. "Knowledge management" is about creating a work environment that encourages team work, collaboration, the sharing of knowledge, and continuous learning. If you would like our help with this, just ask.

How to use the handbook

Three kinds of tools are listed in this guide. The first, "Methods of Transferring Knowledge", details how you can pass on or receive learning and information to and from your peers. The second, "Knowledge Sharing Meetings" are actually physical and virtual settings in which learning and information can be exchanged. Finally, "Tools Accessible on Entre-Nous", can all be found on CIDA's Intranet.

We invite you to try out some of the tools presented in our **Knowledge Sharing** handbook and let us know what has worked best for you. You may be inspired to invent innovative approaches of your own. The Knowledge Management Secretariat is available to consult with you or to facilitate any strategic process you wish to try.

The Knowledge Management Secretariat

Barbara Brown
Micheline Chartrand
Mélanie Lambert
Jevone Nicholas
Monique Wolfe



***Knowledge
Sharing Methods***

PEER ASSIST

British Petroleum (BP) introduced Peer Assist in 1994. Peer Assist is a method of cooperation, based on dialogue and mutual respect among peers. Peer Assist involves a meeting organized by a work team who are starting up a new project (the hosts). The hosts call on another group who already have experience with a similar project. They introduce the background and data of their project and their capabilities. They then express their specific needs. Once the situation is explained, both teams work together to identify possible solutions to the problem.

You can simplify this method and adapt it to your needs. In a workshop, for example, choose three people who face difficulties related to the workshop theme. Divide your group into three subgroups. Ask each of the three people to present his or her situation to a different subgroup. Once the three people explain their situation, give the subgroups 30 to 40 minutes to discuss the problem, draw from participants' experience and find solutions. In doing this, they must follow the basic rule of brainstorming: there are no bad ideas! Then, each of the three people switches to another subgroup. They explain their situation again, adding the broad outlines of what was discussed with the previous team. Discussion continues for 30 to 40 minutes. The theme develops with the new subgroup's knowledge and experience. Repeat this process a third time. Bring the whole group together to wrap up the exercise. See what you have learned.

In an exercise like this, everyone must be kept on an equal footing. This is a chance to promote cooperation. This is a chance to combine the strengths and abilities of the people involved.

Peer Assist may be useful in these and other situations:

- You are starting a new assignment. You want to benefit from the advice of more experienced people.
- You face a problem that another group has faced in the past.
- You have not had to deal with a given situation for a long time. You are no longer sure what new procedures to follow.
- You are planning a project that is similar to a project another group has completed.

Benefits and strengths

- Benefits both parties. Hosts gain important knowledge. Those consulted think and learn more about their experience.
- Provides a highly focused environment for knowledge sharing.
- Concentrates on a specific task. Can be applied immediately.
- Allows you to seek knowledge outside your working group.
- Promotes cooperation between teams. Develops strong networks.
- Saves time. Is easy and low-cost.
- Helps you make informed decisions.

References

Collison & Parcell 2001; Dixon 2000; National Health Service (UK) 2001; TEARFUND.

AFTER ACTION REVIEW

The US Armed Forces originally developed After Action Review (AAR). AAR's main purpose is learning by talking and thinking about a completed activity or project. Its goal is simply to state lessons learned, rather than to solve problems or criticize.

AAR must be done in-house. If possible, it must be done right after the activity discussed. The exercise aims to capture the lessons before they are forgotten. All stakeholders in the process, and they alone, are invited to join the discussion group. Everyone must take part with an open mind. The success of this exercise depends on the participants' goodwill.

Basic rules for AAR:

- Focus on constructive feedback. Recognize positive contributions.
- See all participants as equals.
- The group must think about the questions below:

1- What was supposed to happen? ⇒ Why?
2- What actually happened? ⇒ Why?
3- What is the difference? ⇒ Why?
4- What went well? ⇒ Why?
5- What could have gone better? ⇒ Why?
6- What lessons can we learn?

Benefits and strengths

- Applies to any activity with a preset goal. It doesn't matter how long the activity took. It doesn't matter how many people were involved.
- Used as part of a long process, AAR can be applied as soon as each phase is completed.
- Gives all participants the chance to share their ideas and to be heard.
- Allows people to realize what they have learned.
- Creates a climate of confidence in the team.
- Can be applied at any point in a project cycle.

Other key points

- Remember: AAR focuses on process, not individual performance.
- This exercise does not produce any formal report. No formal report is officially entered into the system.
- AAR results can be documented informally and shared with other interested groups. Participants must thus ask themselves what other teams could benefit. Participants must not hesitate to share AAR results.
- It must be ensured that participants can eventually see the impact of the lessons learned.

References

Collison & Parcell 2001; Dixon 2000; National Health Service (UK) 2001; New York State 2002; TEARFUND.

STORYTELLING

People have told stories for thousands of years. Even today, stories are part of our daily lives. Stories have recently been rediscovered as a way to transfer knowledge. Stories allow us to describe employee relations or activities in a formal or informal way. The aim is to transmit tacit knowledge that an organization can use. Stories are a simple and accessible way to communicate complex ideas, key messages and lessons learned.

Telling stories out loud engages people's minds, imaginations and emotions. This makes storytelling much more accessible than theory, and a very powerful way to transfer knowledge. But we must recognize the importance of analytical thought. We must use stories to complement other tools.

Benefits and strengths

- Stories are funny, interesting and memorable.
- Their language is real and personal.
- Stories simplify complex things. Stories are concrete and accessible.
- The audience easily identifies with the story.
- Stories inspire us to take action.
- Stories foster a sense of community. They promote the development of human relationships.

Other key points

- A good story ...
 - is brief, simple and concise, but gives sufficient background information;
 - involves a character people can easily identify with;
 - is plausible, lively and exciting;
 - is told with conviction;
 - always ends on a positive note.
- Remember: stories are not always effective. They may sometimes be inappropriate.

Put it in writing

Writing stories down adds another dimension to transferring individual knowledge and learning. At CIDA, we will very soon have our own database of work-related stories. Your colleagues have told these stories. You may have told them yourself. Keep your eyes open! Got a story to tell? Call Valerie Young at 994-6137 or Mélanie Lambert at 934-1019.

References

Denning S. 2001; National Health Service (UK) 2001; New York State 2002.

MENTORING

Mentoring is a learning relationship between two employees. **Mentors** are experienced employees who share their knowledge, experience and ideas with less experienced employees, or associates. **Associates** are people who have shown what they can do. Associates really want to acquire new knowledge and skills. Mentoring is not specific to a position. A mentor is not the employee's manager. Mentoring occurs outside any formal employer-employee relationship.

Mentoring looks to the future. Its aim is career development. Its aim is to give associates the general management and/or leadership skills that will prepare them to meet the demands, roles and responsibilities that lie ahead. Mentoring is based on mutual commitment, respect and trust.

Benefits and strengths

- Less experienced employees become better equipped to meet CIDA's future challenges. They become better equipped to provide the leadership that will be needed.
- Mentoring gives mentors the chance to share their experience and expertise in a rewarding relationship. Mentors are also exposed to new ways of thinking and doing things.
- For CIDA, mentoring improves internal communication. It improves knowledge sharing. It makes the work environment more stimulating and productive.

Want to take part in CIDA's Mentoring Program? Want more information? Call Sylvain Chrétien at 953-5934.

References

CIDA 2003; Casavant 2002; Human Resources Development Canada 2001; Hunt 2002; New York State 2002; Treasury Board of Canada Secretariat.

COACHING

Coaching is not mentoring. In mentoring, employees are guided by the advice and experience of senior counterparts who "take them under their wing". Coaching specifically aims to develop new qualifications and skills in an employee. It aims to improve that person's learning and job performance, so that he/she can then reach organizational goals. The coach does not convey his or her personal vision to the employee. Coaching focuses solely on the employee's predefined needs as these relate directly to his/her job; however, this relationship does not necessarily mean that the person reports to the coach. Coaching aims to develop abilities to meet targeted goals in a given work situation.

Benefits and strengths

- Makes the employee feel more confident.
- Gives the employee real support and follow-up.
- Gives the employee the chance to learn from the coach's experience.
- Improves the employee's chances of success.

References

Goldsmith 2000; Human Resources Development Canada 2001; Hunt 2002; National Managers' Community; Treasury Board of Canada Secretariat.



***Knowledge
Sharing Meetings***

COMMUNITIES OF PRACTICE (Networks)

“A community of practice (CoP) is a group of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis.”

Cultivating Communities of Practice: A Guide to Managing Knowledge
Wenger, McDermott and Snyder

Knowledge is both social and individual. Forming a group thus promotes learning and innovation. Creating a community of practice (CoP) is a way to share your knowledge with others who are passionate about the same topic. In return, you learn from their knowledge and experience. CoP members freely discuss the various situations they face. They share their aspirations. They identify their needs. They develop a unique, action-oriented perspective. Together, they discuss, innovate and develop a common practice in their field.

CoPs can be small or large. CoPs can be internal or linked to partners outside the organization. CoPs can be virtual or physical. CoPs develop and must be tailored to their members' needs. CoPs are not like working groups. CoPs do not mainly aim to achieve a collective result. A CoP is a place where people collaborate. They learn from others. They share with them. CoP members manage their tacit and explicit knowledge in a given field as effectively as they can.

At CIDA, our knowledge sharing networks are CoPs. You can easily surf our network page: *“New Entre Nous/Development/Knowledge Sharing Networks”*. To join a network, you must contact its coordinator. His or her name is found in Entre Nous on the page of the network concerned.

Benefits and strengths

- Allow crosscutting discussion. CoPs transcend silos.
- Link the organization's formal and informal mechanisms.
- Are a vital component of a learning organization.
- Allow you to test new ideas. CoPs allow you to develop a context-specific common practice.
- Generate new knowledge in response to specific problems and issues.
- Lead to sharing specialized knowledge. CoPs make it easy to identify people in a field.
- Are an effective way to manage thematic and sectoral knowledge.

Other key points

- A CoP's life cycle depends on what its members want and need.
- A CoP vitally needs resources: a core of support and a coordinator, time, technological support, a common space for resources, community events.
- The skills of CoP members must be tapped.
- Topics discussed must be linked to the members' daily work.

References

De Merode L. 2000; New York State 2002; Wenger E.C., Mc Dermott R. & Snyder W.M. 2002; Wenger E.C. & Snyder W.M. 2000.

FORUMS AND MEETINGS

Small meetings, discussion groups and large forums can all serve as opportunities for sharing knowledge and learning. But, for this to happen, they have to be organized with learning in mind. The process of the meeting, discussion or forum has to be well planned in advance. By forums and meetings, we are referring to everything from a large conference or congress, to round-table discussions that happen on their own or inside a larger conference, to armchair presentations or panel presentations, and any type of staff or regular meeting that brings people together. Meetings and forums can be useful learning and knowledge sharing opportunities when:

- They are planned to be interactive. Presenters must not only allow for questions from participants. They must also plan exercises that permit participants to work in small groups. This work must be fed into the larger discussion.
- The process of the meeting is carefully set out. It must be clear to all. Everyone must be included.
- The forum or meeting's objectives are clear to all and agreed by all.
- Both outspoken and quiet participants have the opportunity to contribute.
- The formal presentations are clear and to the point. They stick to the time limit allocated (usually not more than 20 minutes per presenter and not more than 40 minutes of presentations overall).
- The chair or manager of the process is clearly identified, has a plan and sticks to it.

Advantages of forums and meetings as learning opportunities

- Meetings are part of our everyday work. By making minor adjustments, we can turn them into better learning events, without making dramatic changes in how we work.
- There is considerable experience on how to organize interactive meetings, how to improve participation in meetings or simply how to make meetings more effective. This is not a new area of endeavour. There is lots of help available.
- Meetings are part of a larger process. They should generally not be seen as stand-alone events.

Things to be careful about

- There are clear processes for meetings of 50 people or less. There are other processes for more than 50 people. Make sure you consult an expert. It will save you a lot of time and energy.
- Ensure that the follow-up to the meeting is clear. Who is going to do what and when? What are the next steps in the process?
- Try reviewing the process of the meeting when it is over: effectiveness of the chair, participation, clarity of objectives, ability to stay on topic. This will help to improve everyone's meeting skills.

References

Maccio 1995; National Manager's Community; *The Journal of Applied Behavioral Science*, Vol. 28, Number 4, 1992.

WORKSHOPS, TRAINING AND SEMINARS

In traditional courses, people listen to the presenter without interrupting. More and more, this approach is giving way to a much more dynamic and stimulating group learning process. This may involve a workshop, training session or seminar. The trend in learning activities is now for people to interact with their peers. People share what they know. People discuss things. People benefit from each other's views and experiences.

A presenter no longer leads these meetings. A facilitator does. The facilitator's mandate is to guide the various activities and discussions throughout the event.

Several knowledge-sharing methods can be used in a seminar, training session or workshop. These methods can be tailored to your needs. For example:

- Invite key people from outside your organization. They can make presentations, and you can discuss them.
- Working in subgroups? Switch them around on a regular basis. That way, everyone can meet a lot of people and learn as much as possible.
- Do a peer assist with people who have difficulty with the topic discussed.
- Invite people to tell you their stories/experiences relating to the topic discussed.

Benefits and strengths

- Allow more active learning.
- Give access to a multitude of resources.
- Allow fuller, deeper discussion.
- Give the chance to liaise and network among the different stakeholders.
- Allow you to integrate other ways to transfer knowledge.
- Offer a very flexible structure to which you can easily adjust.
- Give access to a pool of different experiences from which we can learn.

Other key points

Try new ways to do things in your workshops, training sessions or seminars. Talk to colleagues with experience in this kind of event. Repeat best practices (the ones that worked best). Avoid those that didn't work as well. Try to learn from your peers in organizing training activities. You can only benefit!

Keep your eyes open! CIDA's Continuous Learning Campus is developing its new section on group learning and group discussions. You are sure to find interesting tips and tricks there!

KNOWLEDGE FAIRS

Got a lot of information to share with a whole lot of people? Think an interactive presentation would be the ideal way to share your knowledge of a specific subject? Then it may be useful to organize a knowledge fair.

A knowledge fair is designed to present information on a chosen theme. You can use several technical means to present your information to the target group. They include showcases, panels, scale models and kiosks. You can also have all kinds of demonstrations and presenters.

CIDA held a knowledge fair in the Fall of 2002. The Knowledge Management Secretariat organized "Knowledge Week". Several other work teams also choose this method. They organize exhibits or demonstrations in the lobby at 200 Promenade du Portage. Take the time to stop by!

Benefits and strengths

- You can present a lot of information.
- People focus on what interests them.
- There is immediate interaction with the presenter.
- Excellent for networking. Establishes contacts for the future.
- Organizers strengthen their team spirit and ability to work together.
- Recognizes best practices and people's achievements.

Other key points

- Sometimes requires long, painstaking preparation.
- May entail many costs (room rental, equipment rental, resources).
- Watch out for information overload.
- Advertising is important.
- The support of your senior managers is essential.
- Location is crucial to the success of your event.

AND ABOVE ALL, DON'T TAKE YOURSELF TOO SERIOUSLY!!!

References

Denning 2001; New York State 2002.



***Tools Available
Through Entre Nous***

EXTRANETS

Extranets are interactive databases accessible through the Entre Nous. They are common spaces in which you can give access to external subscribers through a password and user identification number. Many of CIDA's thematic networks and workgroups use this tool as a means to create a common resource centre. In addition, an extranet allows subscribers to follow various discussion threads on a topic or a document.

The extranet is thus a virtual space. It aims to make key documents accessible and available to those who need them. Groups such as communities of practice (CoPs), or working groups, can use the extranet. They can collect, evaluate and disseminate works relating to a chosen theme.

Want to see the list of CIDA extranets? Want to find out more about these tools? Visit *New Entre Nous/Development/Extranet Directory*. You can also subscribe to extranets that interest you. You will regularly receive a list of all their newly posted documents.

Benefits and strengths

- Extranets let people work together, even at a distance.
- Interactive: all participants can post documents and comments there.
- Extranets let people share, create and apply knowledge. The user group can thus be effective and productive.
- Extranets are easy to access and surf.

Other key points

- Note: You MUST keep documents on the site up to date. You MUST archive documents that are obsolete.
- Watch out for information overload! Don't put all your documents on the extranet.
- Tip: A senior advisor should be responsible for carefully choosing documents to be posted.
- Keep your site simple.
- Use the site map to make your searches easier.
- Other collaboration platforms may interest you, such as Quick Place.
- Extranets offer you various possibilities to be developed according to your needs. Find out more. Consult CIDA's extranet toolbox, or call our Networking Ace, Larry James, at 994-4172.

References

ITMB 2002.

EXPERTISE LOCATOR SYSTEMS

Looking for expertise in a field you want to explore? Want to reach someone who worked on a team in a region at a given time? Want to contact the Head of Aid, or a locally engaged professional, in a specific country? Expertise locator systems have arisen to make connections between people. They let you find key people who have acquired significant knowledge and experience in specific fields. These systems are used to identify hidden expertise in an organization.

Expertise locator systems are also known as expert directories, expertise directories, skill directories, skills catalogues, white pages or yellow pages. Expertise locator systems help employees to know how to seek and find experts who have answers to their questions. CIDA has improved and tested an existing directory as a pilot project. The **Mission Directory** lets you reach your colleagues in the field. It lets you find out their areas of knowledge: priorities, sectors, countries and specific areas of knowledge and skill.

You can now:

- perform advanced searches;
- mass e-mail everyone who meets your search criteria;
- personalize your profile;
- export a search result to a worksheet.

A directory of all CIDA staff is also being developed. This will allow headquarters staff as well to fill in your areas of knowledge. You can thus give others the benefit of your expertise. At the same time, you will be able to pick other people's brains!

Benefits and strengths

- Lets people know each other's areas of knowledge.
- Lets you find specific expertise, or a specific person, quickly and easily.
- Helps to hook up employees of an organization whose offices are at a distance.

Other key points

- Note: Information must be validated. It must also be kept up to date.
- Note: It is not enough just to create the tool. You also have to promote its use.

References

American Productivity & Quality Center 2003; National Health Service (UK) 2001.

ELECTRONIC DATABASES

Consulting the Agency's various databases is another way to access information fast. Databases are large banks of information. They will help you find what you are looking for. Bilateral branches, such as Asia or the Americas, have their own databases on projects and documentation vital to your research. The Portfolio Group has designed a database of innovative CIDA programs. Performance Review Branch has created a database of e-lessons. It contains all lessons learned by evaluating CIDA's different projects. A database of CIDA stories is being built. This is a PRB initiative in partnership with the Knowledge Management Secretariat. You can read stories told by CIDA employees.

Do not forget to visit other Donor Agencies' sites and their numerous databases (New Entre Nous/Development/Donor Agencies). You can access other external databases through CIDA's International Development Information Centre (IDIC). Their online research databases hold a wealth of resources on development published outside CIDA (New Entre Nous/IDIC).

All these electronic databases are a way to keep all documents on a chosen theme together in one place. Check them out!!!

THE MAGAZINE

They say CIDA employees are passionate about their work. They develop better programs. They think of new approaches. They test new mechanisms. In a nutshell, they take satisfaction in a job well done.

But a passion has to be nurtured. That's what **The Magazine** proposes to do. On any topic that might inspire your programming in any way, **The Magazine** will tell you about:

- the key issues involved in new approaches;
- what people think about them;
- what interesting things your colleagues are doing;
- experiences in budgetary support;
- efforts to strengthen our field presence;
- what's happening with programs in countries of concentration;
- untying aid and international competitive bidding;
- a corporate initiative that makes your life easier.

... and lots more. **The Magazine** will cover a variety of subjects for you in the coming months. We will update the site monthly.

Thumbs up? Thumbs down? Suggestions?

Let the production team know (**Magazine/acdi-cida/g_c/ca@acdi-cida**).

The Magazine is for you. (New Entre Nous/Development/The Magazine)

Want more information? Call Louise Brunet at 934-0680.



References

REFERENCES

AMERICAN PRODUCTIVITY & QUALITY CENTER (APQC). *Expertise Locator Systems: Finding the Answers*, A Collaborative Best Practices Project, 2003.

CASAVANT, Richard. *Workshop for mentors: workshop for associates*. CIDA, March 2002.

CIDA: Continuous Learning Campus. *Mentoring Program*, FAQ, 2003.
Entre Nous – Continuous Learning Campus/Mentoring Program

* **COLLISON, C. & PARCELL, G.** *Learning to Fly*, Capstone Pub, 1st edition, March 15, 2001.

DE MERODE, L. *Communities of Practice (CoPs)*, presentation to CIDA, Silver Creek Associates, May 2000.

DENNING, Stephen. *The Springboard: How Storytelling Ignites Action in Knowledge-Era Organizations*, Butterworth-Heinemann, Woburn, MA, 2001.

<http://www.stevedenning.com/>

http://www.stevedenning.com/knowledge_fair.html

* **DIXON, Nancy M.** *Common Knowledge: How Companies Thrive by Sharing What They Know*. Harvard Business School Press, 2000.

GOLDSMITH, Marshall. *Coaching for Behavioral Change*, amended from: GOLDSMITH, LYONS AND FREAS, JOSSEY-BASS. *Coaching for Leadership*, 2000.

HUMAN RESOURCES DEVELOPMENT CANADA. 2001.

www.hrdc-drhc.gc.ca

www.hedc-drhc.gc.ca/dept/gcca/lareleve/coach/coach1x.shtml

www.hedc-drhc.gc.ca/dept/gcca/lareleve/coach/mentor1x.shtml

HUNT Joanne. *Coach? Mentor? Leader? Manager?*, New Ventures North, 2002.

http://leadership.gc.ca/static/coaching/documents/coach_mentor_leader_manager_e.shtml

ITMB. "Extranets at CIDA: Working Together, Apart", CIDA extranet toolkit, October 2002.

[http://entrenous/PHOENIX/AIS/AISdocs.nsf/vLUIimages/Xnet_toolkit/\\$file/XnetTK-title-e.pdf](http://entrenous/PHOENIX/AIS/AISdocs.nsf/vLUIimages/Xnet_toolkit/$file/XnetTK-title-e.pdf)

JOURNAL OF APPLIED BEHAVIORAL SCIENCE, THE. Special issue: Large Group Interventions, published by NTL SAGE Periodicals Press, Vol. 28, Number 4, December 1992.

MACCIO Charles. *Des réunions plus efficaces*, 2nd edition, revised and expanded, Chronique Sociale, Lyons, 1995 (available at Continuous Learning Centre).



NATIONAL HEALTH SERVICE (UK). *Specialist Library: Knowledge Management*, National Electronic Library for Health, 2001.

http://www.nelh.nhs.uk/knowledge_management/default.asp

http://www.nelh.nhs.uk/knowledge_management/KM2/white_pages_toolkit.asp

* **NATIONAL MANAGERS' COMMUNITY.** "Tools for leadership and learning - Building a learning organization" Government of Canada. www.managers-gestionnaires.gc.ca
See: Coaching Practices for Managers; Career Development; Managers' Tools.

NEW YORK STATE: Department of Civil Service/Governor's Office of Employee Relations. *Knowledge Management / Transfer*, by the Knowledge Management/Transfer Workgroup, New York State, November 2002.
<http://www.cs.state.ny.us/successionplanning/workgroups/knowledgemanagement/knowledgemanagettransfer.html>

TEARFUND – Christian Action with the World's Poor. *Techniques for Capturing Learning in Tearfund*, draft.
http://mail.bellanet.org/kmdir/upload/TearFund_Learn.doc

* **TREASURY BOARD OF CANADA SECRETARIAT.** *The Leadership Network*, [www.leadership .gc.ca](http://www.leadership.gc.ca)

WENGER E.C., MC DERMOTT R. & SNYDER W.M. *A Guide to Managing Knowledge: Cultivating Communities of Practice*, Harvard Business School Press, Boston, 2002. (available at IDIC [International Development Information Centre])

WENGER E.C. & SNYDER W.M. *Communities of Practice: The Organizational Frontier*, Harvard Business Review, January-February 2000.

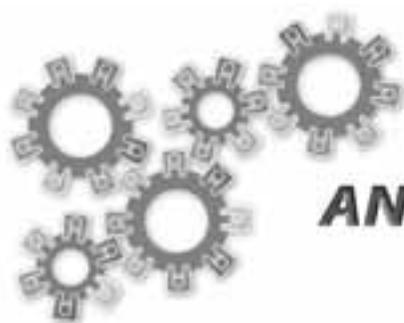
OTHER INTERESTING REFERENCES

DEPARTMENT FOR INTERNATIONAL DEVELOPMENT (DFID). *Tools for development: A handbook for those engaged in development activity*, Performance and Effectiveness Department, Version 15, September 2002.

ROBBINS H. & FINLEY M. *The New Why Teams Don't Work: What Goes Wrong and How to Make it Right*, Berrett-Koehler Publishers Inc., San Francisco, 2000.

Note: Some of these references are found on our knowledge management extranet. Want more information? Having trouble finding these references? Feel free to contact us at the Knowledge Management Secretariat. We'll be happy to help!

* **OUR FAVOURITES**



ANNEX
Job Aids

CAREER PLAN

Name: _____ Branch: _____
 Position: _____ Since: _____
 Level: _____ Languages and Levels: _____

Past Experience and Education

Summary of your past achievements, especially those relevant to your future objectives.

Plans – What I would like to do ...

1. SHORT-TERM (0-2 years)	<ul style="list-style-type: none"> • Stay in my position • Stay in the same Branch but change position What position? • Go into the field. Where? • Go somewhere else. Where? (Specify your choice) <ul style="list-style-type: none"> - Other CIDA branch - Other department - Education leave - Exchange program - Others
2. MEDIUM-TERM (2-5 years)	
3. LONG-TERM (5 years +)	

Why?

What skills do I need to acquire?

What do I need to reach my goals? (Specify)

- Training
- Experience
- Others

Comments and Signatures

Employee: _____
 Supervisor: _____
 Director General or Vice-president: _____

Note: Human Resources Branch is developing a **learning plan**. Watch for it! Meanwhile, check out the Human Resources Development Canada learning plan:

<http://www.hrhc-drhc.gc.ca/dept/gcca/lareleve/learn/pt1x.shtml>

or surf the National Managers' Community site:

<http://www.managers-gestionnaires.gc.ca>

WORK PLAN

Key words: WHO, WHAT, WHEN and SIMPLE

The basic rules:

1. Keep your work plan as **SIMPLE** as possible.
2. Begin by determining your medium-term objectives or results, that is, between 1 and 3 years.
3. Identify the **main activities** without losing yourself in the details. You can make a more detailed plan for a specific section of your overall work plan as needed.
4. Specify **WHAT** and **WHEN**.
5. **ESSENTIAL** – You absolutely must identify **WHO** - and this must be a **specific person** and not a group - will be responsible to lead follow-up on each task. It is not always easy to determine who will be the designated leader of an activity, but you will very quickly see that once this step is taken, the roles and responsibilities of each person become much clearer and better defined.

One example:

OBJECTIVE 1: INNOVATION – Put in place pilot projects to test methods and tools that will stimulate a change in work culture towards greater sharing of information, collaboration, team work, and learning.			
Activities	Deadlines	Partners	Lead
1. Knowledge from the Field project <ul style="list-style-type: none"> • Work plan for the presentation of the project 	October 27	Work group	Micheline
2. Country pilot projects <ul style="list-style-type: none"> • Tanzania • Central Asia 			Micheline Barbara
3. Learning project <ul style="list-style-type: none"> • Knowledge sharing tools handbook • Database of CIDA stories • Workshops 	October 20 Mid-November November 13	Valerie Young	Mélanie Barbara/Mélanie Micheline

OBJECTIVE 2: INTEGRATION – Identify those activities that could be integrated into our corporate systems : ask question, bring together and facilitate partners, identify opportunities, make recommendations, follow-up.			
Activities	Deadlines	Partners	Lead
1. Networks <ul style="list-style-type: none"> • Develop a strategy for anchoring the networks 	Autumn	Policy	Micheline
2. Participate in implementation of the new Entre Nous <ul style="list-style-type: none"> • Update the KM extranet and the networks page 	October	Judith B.	Geralyne
3. (...)			

Continue in this manner...

ROADMAP FOR COORDINATING EVENTS

Events: _____ Planned for: _____

Activities	To do	Contacts	4
Reserve room	As soon as possible	Administrative assistant	
Reserve equipment	As soon as possible	HRCS: Audio-visual Services	
		Your IMO [information management officer] for laptop computers	
		HRCS: Assets Management for chairs, tables, easels, etc.	
Posters: <ul style="list-style-type: none"> • Composition/translation of text • Approval by your branch communications team • Production request to Communications • Posting in Entre Nous: Communications • Postering 	Start procedures at least 3 or 4 weeks before the event begins <ul style="list-style-type: none"> • Allow at least 2 weeks • 1-2 weeks in advance • A few days in advance 	<ul style="list-style-type: none"> • Translation Bureau • Communications • Creative Services Unit • WEB and New Media Unit 	
Posting on knowledge management calendar of events	As soon as possible	Knowledge Management Secretariat	
Personal invitation by e-mail (optional) to the target group	2 weeks before the event	N/A	
E-mail reminder of the event (date, place, time)	Day before the event	N/A	
Confirm equipment	Day before the event	HRCS Audio-visual Services	
		Your IMO	
Test equipment	45 minutes before the event	N/A	
Distribute attendance sheet (optional)	During the event	N/A	
Take notes (optional)	During the event	N/A	

HOW TO COMMUNICATE AND WORK WITH YOUR COLLEAGUES IN THE FIELD

Conference Call

Weekly field meetings: Ever thought of “hooking up” your colleagues in the field to a conference call? Invite them to take part in your weekly meetings.

Videoconference

Meet your colleagues in the field “face to face”. It can be very beneficial. You can work together regularly as a team, though you are thousands of kilometres apart. Arrange meetings to build team spirit. Get to know one another. Work together, apart.

Compact Disks and Audio/videocassettes

Holding a special event? Don’t be shy! Film or tape-record the proceedings. Send the film or tape to the field. Your colleagues will be delighted. They will feel like they were actually there!

Expanded BMG [branch management group], meetings with field representatives and support units

Going to a meeting where you have the chance to meet field representatives? Think about using the opportunity to arrange a Peer Assist. It means a lot to get input from employees who experience the daily realities of recipient countries.

Field Representatives Forum

Get more mileage out of the Field Representatives Forum. It’s a useful communication tool for your work team. You can even hold your own forum in your branch. Americas Branch does this already with Field Reps Newsletters.

Formal and Informal Networks

Invite field personnel to be members of your networks. They can take part in meetings by conference call, and occasionally by videoconference. Plan your meetings accordingly.

Work Plan

Do you share a team work plan with your colleagues in the field? How are tasks assigned? What role do team members at Headquarters play? What role do field personnel play? Have you discussed this?

Field Visits

Making a field visit? Make sure to arrange meetings with CIDA field personnel in the aid section and the PSU. Invite key stakeholders in your projects. Work with them in person while you have the chance. Get to know your colleagues in the field.

HOW DO I FIND MY WAY AROUND IMTB?

Not sure who to contact for help with your IM/IT needs? Check the table below. And don't forget: you can always contact your branch *Information Management Officer* for IM/IT information, expertise and hands-on support.

I need ...	How to get it
To get quick technical support for my computer, software, hardware, Entre Nous or the Agency Information System (SAP)	Contact the Help Desk <ul style="list-style-type: none"> • Phone: 994-1904 • E-mail: helpdesk@acdi-cida.gc.ca
To find information about international development	International Development Information Centre (IDIC) site <ul style="list-style-type: none"> • Phone: 953-1035 • Location: 8th floor • E-mail: cidi-idic@acdi-cida.gc.ca
If you need help in working with computers because of a long-term or short-term disability	Call, write or visit the Adaptive Computer Technology (ACT) Centre <ul style="list-style-type: none"> • Phone: 994-1534 • Location: Room 951 • E-mail: ACT-TIA@acdi-cida.gc.ca
For advice and help in generating a report	Contact the Corporate Reporting Services Group (CRSG) <ul style="list-style-type: none"> • Phone: 994-7096 ou 953-3349 • Location: 8th floor, IDIC • E-mail: sylvain_therien@acdi-cida.gc.ca sandra_everson@acdi-cida.gc.ca
To request a new IM/IT product or service, or a change to an existing one	Send an e-mail to the IMTB Mailbox <ul style="list-style-type: none"> • dggit_imtb@acdi-cida.gc.ca
If you want automatic notification of news from IMTB	Go to the IMTB Newsroom for a full list of notification categories on Entre Nous
To find contact information for CIDA field personnel	The Mission Directory <ul style="list-style-type: none"> • http://entrenous/repertoiremission • fieldbox@acdi-cida.gc.ca
To use computer technology to work offsite	Contact your branch IMO to discuss your remote access needs
To post a message on Entre Nous	Contact Denise Montminy (Communications Branch) <ul style="list-style-type: none"> • 994-3756
To put a button on Entre Nous	Contact: Nicole Moisan (953-2558) Lucie Laplante (953-6394)
To have access to a database or other team workspace	Contact the Help Desk <ul style="list-style-type: none"> • Phone: 994-1904 • E-mail: helpdesk@acdi-cida.gc.ca
To give feedback to IMTB about its products or services, or to ask a general question	E-mail the IMTB Mailbox at: <ul style="list-style-type: none"> • dggit_imtb@acdi-cida.gc.ca

EMPLOYEES' KNOWLEDGE SHARING "CUE CARD"

Wonder how you can share your knowledge more effectively? Here are some questions you should keep at your fingertips:

Employees' Knowledge Sharing "Cue Card"

Employees can model greater knowledge sharing behaviours by:

- Asking colleagues: "Who else have you shared this submission/report with?" and "Do you know someone who could make use of this information?"
- Asking colleagues: "What have you learned from this project/program/activity?" and "Who could you share these lessons with?"
- Before approving a new project or initiative, ask: "What have you learned about other activities that this organisation has done in this sector/region/with other Branches? Can you/we make use of this learning?"
- Asking colleagues: "What have you learned as a result of checking our library/knowledge base (SAP, CRAFT, Corporate Memory)?" and "How could you build on this knowledge with your project/program/activity?"
- Asking colleagues: "Who are the experts in this topic/sectors/regions either inside or outside the Branch/Agency?" and "Have you discussed this with these experts? If so, what have you learned?"