

# KNOWLEDGE MANAGEMENT

GUIDANCE

2023



The strength of the Palestinian Housing Council (PHC) relies deeply on our steadfast commitment to implement all policies and guidelines throughout the execution of PHC's programs and projects. It is our endeavors that form the foundation of our enduring success, and strive to embody the highest ethical and professional standards. This commitment is essential to accomplishing our humanitarian and societal goals and mission. We emphasize the commitment of all PHC employees, across various administrative levels, to adhere to specific policies and frameworks applicable to their respective domains.

These policies and guidelines, signify our complete involvement in building a sustainable and equitable community. They express our fervor in delivering optimal housing services to the community in which we live and operate. The application of these policies is a fundamental pillar in building the PHC's reputation as a trusted entity, committed to sustainable development and earnest work.

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## **Introduction**

Knowledge Management (KM) unites the efforts of people and units within PHC to leverage learning from past experiences to inform future actions—enabling the PHC to make the best use of its knowledge resources and staff. KM approaches can help achieving the case for which these goals are valuable to PHC and advising on how to advocate organizational leadership to invest in KM and on how to demonstrate the value of KM to staff.

## **Definition**

KM is “the process of creating, sharing, using and managing the knowledge and information of PHC. It refers to a multidisciplinary approach to achieve organizational objectives by making the best use of knowledge.” PHC seeks to ensure the right to information is available to the right people at the right time. Knowledge Management enables PHC staff to be more efficient and improve the quality of service, increase customer satisfaction and reducing the cost-of-service, support, and delivery.

There is a common understanding that collective knowledge produces better solutions to complex problems than individual knowledge or expertise.

- KM is important because it unites the efforts of multiple people and departments within PHC to address a challenge—it allows PHC to make the best use of resources, avoid re-inventing the wheel, solve a problem only once, and ensure that those lessons can be applied again when needed.
- KM ensures staff can work faster, cheaper, and smarter by leveraging past experiences to inform future actions.
- KM also helps PHC to develop corporate capabilities by harnessing key learnings so knowledge can be recorded, codified, and made available for future use, even if the individuals originally involved leave the organization.

The goal of Knowledge Management is to enable PHC to improve the quality of management decision-making by ensuring that reliable, secure information and data are available throughout the service lifecycle.

- KM increases end-user satisfaction and perception.
- KM provides more efficient usage of resources (provides relevant information to aid in complex scenarios where knowledge may not be learned).
- KM improves service delivery consistency when applied to process activities (e.g., standard changes are executed the same way every time, collecting the same predefined criteria).
- KM improves reporting (e.g., drives the repetitive coding of incidents for a specific scenario)

## **Scope**

This document will serve as the official process of Knowledge Management for PHC and will introduce a Process Framework and document the workflow, roles, procedures, and policies

needed to implement a high-quality process and ensure that the processes are effective in supporting the business. This Guide is a living document and should be analyzed and assessed regularly.

## Objectives

PHC KM supports two basic objectives that are important to the growth and survival:

1. **Improve efficiency and productivity:** Reducing resource use to achieve the same outputs and/or increasing outputs or performance with the same level of resources streamlines work processes and improves the capacity of employees to accomplish their work. KM processes and strategies can directly increase employee capacity to perform their assigned tasks by increasing employee knowledge of effective approaches that others in the PHC have used and connecting employees with PHC colleagues and resources that can help them. Such knowledge can help employees avoid pitfalls, repeating mistakes others have made, and “reinventing the wheel” by wasting time and energy on coming up with a solution to a problem that has already been solved by others in the PHC.
2. **Support PHC Organizational Learning:** PHC Organizational learning is the process by which PHC improves itself over time through gaining experience and using that experience to create knowledge that can be transferred within the PHC and applied again. KM also supports adaptive management actions that emerge from organizational learning, allowing for greater transfer of programmatic innovations to other contexts. Organizational learning can also directly support business development, another critical objective of PHC, by strengthening and expanding organizational capabilities, allowing the PHC to compete more effectively for new business, and creating new business opportunities. Errors detected during Service provision will be recorded and analyzed and knowledge about their existence, consequences and workarounds will be made available to Service Operations staff. Knowledge Management is tightly linked to Problem Management and can include but is not limited to known errors.

## Best Practice of KM

The main challenge for organizational KM is that collective knowledge is hard to pin down; on one hand, it exists in the form of organizational procedures and practices (which may be both explicit and implicit) and knowledge assets like technical approaches, tools, and reports. On the other, a critical source of collective knowledge is the ideas and experience of staff which can be used but are often not written down, existing as tacit knowledge in the minds of individuals.

KM is about making use of all the knowledge PHC has at its disposal and practicing good stewardship of its knowledge resources, which encompass organizational procedures and practices, knowledge assets like technical approaches and tools, individual knowledge, and experience possessed by its staff. However, because so much of an organization’s intellectual capital is contained in the minds of its staff, a vitally important function of organizational KM is making explicit “who knows what”—who in the organization is knowledgeable or adept at certain

practices or skills and having mechanisms in place to draw on their knowledge when needed. This can take the form of experience directories that indicate the detailed areas of expertise and experience of individual staff, but also include mechanisms that facilitate informal knowledge sharing and peer problem-solving within the organization. Such mechanisms include internal listservs (where staff sign up to join topical listservs of interest to them), working groups focused on particular content areas, and spaces for staff to raise challenges and seek solutions from colleagues in existing forums like monthly divisional meetings. For such mechanisms to function, staffs need to know they have “permission” to use time and internal communication channels for peer problem-solving and sharing, and management needs to allocate time and space for such endeavors.

In summary, KM is about making use of all the knowledge PHC has in terms of its employees, its products, and its documented processes and approaches. PHC puts into place knowledge creation and sharing processes and modifies existing work processes so they become opportunities for generating and sharing knowledge. Such processes are more effective when they are organized and intentional, as opposed to ad hoc, and when they extend across the entire organization, as opposed to being localized in only certain units.

There are plenty of best practices that can take PHC from beginner to expert execution of PHC knowledge.

1. **Know your problems:** Before initiating a Knowledge Management Program, understand the underlying challenges you face. Knowledge Management goes beyond investments in technology and requires organizations to facilitate the culture and process that enable effective Knowledge Management. Instigate change in PHC staff and culture that makes it easier to create, find, and share useful knowledge. The first step is to define what Knowledge Management means at the individual level: Is knowledge management simply a set of tasks for a specific number of PHC departments? Some key challenges result due to common mistakes, such as an inadequate understanding of the PHC framework or the focus on capturing knowledge. Instead of treating knowledge management as a separate activity with isolated tasks, PHC should integrate Knowledge Management practices within existing processes and business activities. Integrating knowledge management ensures that the knowledge associated with all critical business operations is generated and captured at scale, without unnecessary delays or complexity of managing knowledge as a separate process.
2. **Measure the Metrics:** Measuring the performance of Knowledge Management initiatives can be difficult considering that the underlying operational processes are designed, conducted, and then evaluated based on references that the organization creates internally. These references may not always present a true performance evaluation, but several alternative KPIs and references can be used instead.
3. **Do not just manage knowledge—exploit it:** Knowledge Management encompasses PHC capacity as well as the actual tasks to collect, store, and manage knowledge. However, the goal of Knowledge Management initiatives may be lost when most resources and frameworks are designed merely to manage the knowledge instead of exploiting it. PHC designs the

Knowledge Management Program that brings about the changes necessary to utilize the available knowledge effectively:

- **Measure the growth and improvement** in Knowledge Management programs in terms of scalability across technology and people.
  - **Conduct surveys and gauge metrics** that provide a detailed description of end-user experience in creating, sharing, and consuming knowledge.
4. **Make knowledge consumable and diverse:** Knowledge Management can be a complex and resource-consuming job function. Especially in large enterprises that must create and manage vast knowledge resources, employees tend to struggle in identifying appropriate problem solutions from the available pool of knowledge items. Instead of dumping knowledge across long articles (a time-consuming process for the writer and the reader alike), PHC presents knowledge in a more user-friendly manner. Replace long articles and explanations with short, actionable guidelines. Adopt a consistent, standardized format for all documentation to make it easier for employees to spot the answers they need urgently.

Accessing the knowledge should not require a focused effort to manually go through large repositories of long articles. Follow a consumer-centric instead of a supplier-based approach. The goal of Knowledge Management is not just to supply the data and information, but also for end-users to easily consume and apply the underlying knowledge. The purpose of accessing knowledge for an individual can be fulfilled far more efficiently by communicating and collaborating with others.

5. **Scale your knowledge sharing:** PHC develop the necessary processes that conveniently allow users not only to create and access knowledge but to adopt it in their routine tasks. Knowledge sharing should be made convenient for employees who would share information using social media channels, wikis, and mobile apps. Incentivize knowledge-sharing activities as it improves the overall capacity of the organization to learn and improve by solving problems for each other efficiently instead of overwhelming the Service Desk.

### **Tactical ways of handling knowledge Management (KM):**

- **Storing knowledge vs. sharing knowledge:** Storing knowledge involves accumulating, codifying, and maintaining knowledge in a reliable storage system. This is a good first step, but successful knowledge management also requires a system to disperse that stored knowledge.
- **Codification vs. personalization:** Codification is any activity where PHC collects knowledge (creating and maintaining databases, content architecture, training to support software storage systems), and creates awareness of these collection systems. Personalization is connecting people to this codified knowledge by forming learning communities, promoting active discussion and knowledge transfer, and facilitating group interaction.

- **Push vs. pull:** These represent two opposing strategies. In a push strategy, individuals actively encode their knowledge to make it available to others. In a pull strategy, team members seek out experts to request knowledge sharing, so you only transfer knowledge on an as-needed basis.
- **Socialization Externalization Combination Internalization (SECI) Model:** The knowledge transfer and strategy model is considered the cornerstone of knowledge management theory. It outlines the four different types of knowledge transfer:
  - **Socialization:** Tacit to tacit, where knowledge is transferred intuitively through observation, guidance, and practice.
  - **Externalization:** Tacit to explicit, which codifies intuitive, intangible knowledge in order to be taught. This type of knowledge transfer is the most difficult because tacit knowledge is extremely difficult to break down into digestible directives.
  - **Combination:** Explicit to explicit, where codified knowledge is transferred or combined with another codified knowledge. This type of knowledge transfer is the simplest.
  - **Internalization:** Explicit to tacit, where an organization follows and practices codified knowledge so that it becomes intuitive.

## Tools and Approaches

KM tools and approaches provide comprehensive information allowing potential users to understand the purpose, benefits of, and guidance on the best timing and application of each tool and approach. Each of the following tools and approaches is explained in a summary table that can be used as a handout or quick guide.

These tools are personalized for the following purposes:

### 1. Solving cross-functional issues:

- Champions: people who practice KM, who believe in the value of KM and who want to see the organization formally, adopt and support more KM practices.
- Working Groups.

Tool # 1	Solving cross-functional issues
What are the objectives of these tools	KM functions within organizations can be involved in the process of resolving cross-functional issues to develop a systematic process, maximize communication among stakeholders, and ensure documentation for future learning.
Why they're beneficial	Allows organizations to break down siloes to accomplish tasks.
When to use them	When a problem spans multiple organizational units.
How to use them	Identify the problem that needs to be solved, and identify the best tool to engage to solve that issue.



## 2. Documentation and communication:

- Planning Tools and Templates.
- Lessons Learned and Program Documentation.
- External Communications.

Tool # 2	Documentation and communication:
What are the objectives of these tools	Usually done in writing, documentation captures information and knowledge generated during a task or activity.
Why they're beneficial	It serves as a record of activities and decisions made that can be refer to later when memories fade. It can help chart the progress of actions and activities, or identify where progress is needed. It can help conversation to address issues that may be raised based on documentation gathered.
When to use them	Documentation can be used at any time during any activity, whether it is an individual or group activity. It can be used in an informal way to capture key elements or in a formal way to be an official record of meetings and decision making
How to use them	Documentation can be gathered manually (via writing) or through audio or video recording.

## 3. Staff experience capture

- On-boarding: is the systemized approach to orienting new employees where they receive information most pertinent for them to effectively do their jobs. Such information could include organizational charts, meetings with key personnel, or in-person or online training.
- Off-boarding: is the systemized process of ensuring staff share their knowledge prior to leaving the organization. Steps in this process could include electronic file identification and transfer, completing a work handover document and/or off-boarding checklist, documenting specific job tasks, and conducting HR and KM exit interviews to capture departing employees' perceptions, experiences, and lessons learned while on the job.

Tool # 3	Staff experience capture
What are the objectives of these tools	Ensuring that a new or changing staff member has a full experience of on-boarding, appropriate mentoring and support, and off-boarding so they obtain the knowledge they need to do their jobs, they add back to the knowledge base throughout, and at the end of their time, they share what they did for future learning.
Why are they beneficial	Ensures the knowledge of the organization is transitioned most effectively to a new staff member and remains part of the institutional memory.
When to use them	Throughout the employee life cycle

How to use them	Intentional thought into every aspect of an employee's experience at the organization, through hiring, promotions and job changes, and exit.
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#### 4. Pause and Reflect:

- After Action Reviews (AAR).
- Before Action Reviews (BAR).
- Debriefing

Tool # 4	Pause and Reflect:
What are the objectives of these tools	Pause and Reflect is a meeting of all stakeholders designed to help identify successes and challenges during working on a project, task, or activity.
Why they're beneficial	Pause and Reflect activities give those involved an opportunity to learn and provide feedback to identify successes and challenges. They provide an opportunity for participants to consider the impact of changes in the environment in which the project or activity occurs. They allow for changes to be made during a project, task, or activity as opposed to when the work is completed. They encourage ongoing communication and can promote mutual understanding and teamwork.
When to use them	Pause and Reflect activities can be done during and after the completion of a project, task, or activity.
How to use them	There are many different approaches to engaging in Pause and Reflect. They include: After Action Reviews, Before Action Reviews, and Debriefing.

#### 5. Peer-to-Peer Learning (Knowledge Exchange and Facilitation):

- Communities of Practice.
- Learning Events and Exchanges.
- Knowledge Fairs.
- Knowledge Cafés.
- Peer Assistance.

Tool # 5	Peer-to-Peer Learning (Knowledge Exchange and Facilitation):
What are the objectives of these tools	Peer-to-peer learning intends to share promising practices about an activity or initiative. Examples include Communities of practice, brown bags, formal learning events, peer assistance, and knowledge café.
Why are they beneficial	They allow learning and sharing to occur among colleagues or those with shared experience, making the knowledge exchange more readily acceptable and understandable.

When to use them	Peer-to-peer learning can be used any time there is a group of individuals with the same focus and interest in learning how to do something or do it better. Ideally, peer-to-peer is most successful when there are varying levels of experience, knowledge, or skills in the area that people have gathered to share and learn from.
How to use them	Develop a clear objective. It is critical to be as specific as possible when defining a peer-learning objective. Identify a community leader. A successful peer-to-peer learning leader's activities and actions are pivotal during the period when the community is first formed.

## 6. Curating, Organizing, Storing, and Using Structured Knowledge:

- Repositories/Knowledge Bases.
- Intranets.
- Document Management and Collaboration.
- Expertise Locators.

Tool # 6	Curating, Organizing, Storing, and Using Structured Knowledge:
What are the objectives of these tools	Ensuring that organizational knowledge is captured without relying on person-to-person communication for retrieval.
Why are they beneficial	These tools ensure that explicit knowledge is available across the organization – meaning anyone can access the institution's collective knowledge at their own need.
When to use them	For both programmatic and organizational information, at all stages of most points of work.
How to use them	Ensure there is always time for documentation, clear ways to contribute to the systems, and clear ways to search them, with minimal barriers.

## Planning Tools and Templates

KM activity this tool supports	Documentation and communication:
What is the tool/ approach	Work-plans, identification of roles and responsibilities, terms of reference, etc. They are living documents that allow teams to record important information about project activities or roles and responsibilities and monitor change over time
Why they're beneficial	Planning tools can get everyone in a group on the same page about roles and responsibilities or progress against activities when working on a collective task. Templates provide structure and consistency when multiple people are assigned to the same task.

When to use them	Ideally at the beginning of any major activity, but they can also provide structure when brought in the middle of implementation
How to use them	Agree on planning tools and templates as a primary step to completing with your team; identify the key tasks and people involved

### Lessons Learned and Program Documentation

KM activity this tool supports	Documentation and communication
What is the tool/ approach	Brief and easy-to-read documentation that outlines the lessons learned and successes of various projects and programs. They are standardized documents that allow a project to be summarized in an easy-to-digest manner that holds up over time and shares information that others can learn from.
Why are they beneficial	They quickly summarize a project for future use and understanding. They can be shared both internally and externally in the form of gray literature
When to use them	At any point throughout the project or program; major milestones should be documented. At the end of a project when the project needs to be summarized and archived.
How to use them	Plan for documentation as part of project design and work planning.  Identify key indicators, either programmatic or qualitatively collected for the documentation, and record the indicators, key results, and lessons in a standardized format.

### External Communications

KM activity this tool supports	Documentation and communication
What is the tool/ approach	Sharing with external audiences the lessons learned and other documents produced in the course of multiple projects or programs. Usually, projects have extensive external communication plans for their work, but organizations should also analyze results across projects to identify organizational themes and strategic objectives that should be communicated to external audiences.
Why they're beneficial	It is a way of ensuring knowledge is shared back into the PHC functions. Such communication also serves to market the organization's capabilities.
When to use them	At any point throughout the work, a major milestone should be documented
How to use them	Plan for documentation as part of project design and work planning.

	<p>Identify work across projects and programs that should be documented and shared with external audience. Think about the listservs, conferences, and external websites through which the information should be shared.</p>
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