

MANAGING INSTITUTIONAL KNOWLEDGE

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AGENDA

- What is institutional knowledge
- How to manage institutional knowledge
- How to make institutional knowledge accessible and re-usable
- A framework for managing institutional knowledge



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WHAT IS INSTITUTIONAL KNOWLEDGE?

Knowledge that an institution uses to carry out its mission

Institutional knowledge is “gained by organizations translating historical data into useful knowledge and wisdom.”

Wikipedia, https://en.wikipedia.org/wiki/Institutional_memory

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INSTITUTIONAL KNOWLEDGE



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QUIZ – IS THIS INSTITUTIONAL KNOWLEDGE?

1. How to write a research proposal
2. How to get a proposal accepted by my university's research committee
3. How to shelve a book in my library
4. Why a book is shelved in the special collection and not in the open stacks
5. How to conduct a reference interview
6. How to negotiate with a difficult but influential client

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WHERE IS INSTITUTIONAL KNOWLEDGE FOUND?

- Documentation
- Skills
- Methods/Processes
- Relationships
- Experience
- Natural talent



Types of Knowledge

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EXPLICIT/TANGIBLE INSTITUTIONAL KNOWLEDGE

- Codified and stored
- Written/documentated
- Promotes consistent practices and responses
- Can be distributed to others without interpersonal interaction
- Found in records, reports, guidelines, policies, blogs, collected publications

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LIST 3 EXAMPLES OF YOUR INSTITUTION'S EXPLICIT KNOWLEDGE AND RANK THEM IN ORDER

- 1.
- 2.
- 3.

60

50

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30

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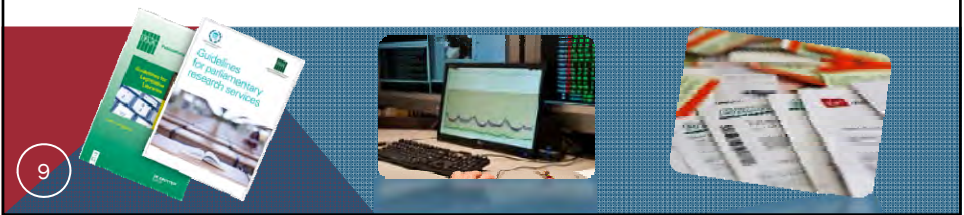
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FOR THE MOST IMPORTANT **EXPLICIT** KNOWLEDGE IN YOUR INSTITUTION:

- Does it have an owner? Who?
- Is it understandable to a new person?
- Is it up to date? Is there a schedule to review and update it?
- Is it accessible (e.g. found in the library or the institution's website)?
- Does everyone who needs this knowledge know where to find it?
- What happens if this explicit knowledge is missing or lost?



IMPLICIT/INTANGIBLE INSTITUTIONAL KNOWLEDGE

- Highly personal
- Hands-on skills, from experience
- Intuition, subjective insights
- Difficult to articulate/ communicate
- Shared through experience, apprenticeship, job training, interpersonal interaction



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X

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THE MOST IMPORTANT **IMPLICIT** KNOWLEDGE IN YOUR INSTITUTION:

- Who has this knowledge?
- Is there a backup person who has this knowledge?
- How is this knowledge acquired?
- How is this knowledge transferred to someone else?
- Can this knowledge be documented?
- What happens if this knowledge is lost?

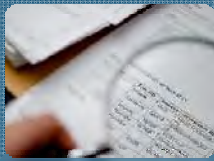
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THE KNOWLEDGE AUDIT

- What knowledge assets does your institution have?
- What knowledge is most important to your institution?
- Where is this knowledge? Is it documented?
- Who holds this knowledge?
- Who needs this knowledge?
- What happens if the knowledge is not known or not shared?
- What happens if the knowledge is lost?
- What are the current issues in making sure that staff has access to your institution's knowledge assets?

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MANAGING **EXPLICIT** KNOWLEDGE ASSETS

- Organize, catalog and preserve
 - Assess value: is it worth preserving?
 - If printed, can/should it be digitized?
 - If digital, are there special factors to consider?
 - Catalog and organize (add metadata)
 - Preserve
- What are the challenges to the above?

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MANAGING **EXPLICIT** KNOWLEDGE ASSETS: CHALLENGES

1. Budget
2. Staff
3. Skills/Knowledge
4. Technology
5. Approval/Buy-in/Support
 - a) From Management
 - b) From Staff

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MANAGING **IMPLICIT** KNOWLEDGE ASSETS

- Assess value: is it worth capturing?
- Make knowledge explicit through documentation
 - Notes, guidelines, frequently asked questions
 - Internal collaboration sites, e.g. wiki
- Gather/transfer knowledge before staff leaves
 - Knowledge/exit interview
 - Develop knowledge base
 - Develop workflows to document knowledge, e.g. project reports
 - Knowledge sharing sessions

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MANAGING **IMPLICIT** KNOWLEDGE ASSETS: CHALLENGES

1. Time
2. Approval/Buy-in/Support
 - a) From Management
 - b) From Staff
3. Staff, Skills and Knowledge
4. Budget
5. Technology

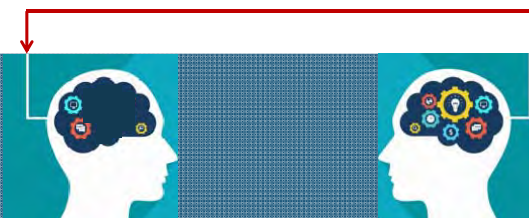
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TRANSFERRING **IMPLICIT** KNOWLEDGE THAT CANNOT BE DOCUMENTED

- Encourage communities of practice
- Develop diverse teams
- Support staff rotation
- Create mentoring programmes
- Have a succession plan

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GOALS OF INSTITUTIONAL KM

- Connect people
- Learn from experience
- Retain knowledge: capture what is worth keeping
- Improve access to documents
- Create best practices
- Innovate

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PUT INTO PRACTICE

- Develop a knowledge sharing culture (must get support from senior managers)
- Have a strategy
 - Get stakeholder buy-in
 - Start small
 - Demonstrate success
 - Keep promoting
- Use a framework

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PUT IN PRACTICE: USEFUL FRAMEWORK

	Discuss	Document	Synthesize	Find/Review
People (who)				
Process (how)				
Technology (facilitate)				
Governance (oversight)				

Nick Milton & Patrick Lambe, *The Knowledge Manager's Handbook*, 2016

FRAMEWORK FOR IKM

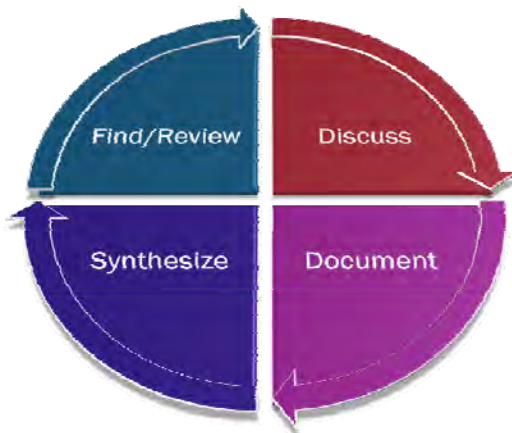
Facets for analyzing a KM issue/project

	Discuss	Document	Synthesize	Find/Review
People (who)				
Process (how)				
Technology (facilitate)				
Governance (oversight)				

FRAMEWORK FOR IKM

	Discuss	Document	Synthesize	Find/Review
People (who)				
Process (how)				
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FRAMEWORK FOR IKM



PUT IN PRACTICE: IKM FRAMEWORK

	Discuss	Document	Synthesize	Find/Review
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CASE STUDY

How to manage knowledge about cybersecurity

- An institution with complex IT systems
- Team in charge of monitoring IT security on the network has a high turn-over of staff
- New staff or contractors do not have knowledge of how local systems are configure, etc
- How would you manage the knowledge of this team?

FRAMEWORK FOR IMPLEMENTATION

Goal: Develop a strategy and plan of action to facilitate sharing and capture of knowledge related to cybersecurity

	Discuss	Document	Synthesize	Find/Review
People	Staff involved in cybersecurity	Librarians and library technicians	Experts or library staff	Practitioners and experts

FRAMEWORK FOR IMPLEMENTATION

Goal: Develop a strategy and plan of action to facilitate sharing and capture of knowledge related to cybersecurity

	Discuss	Document	Synthesize	Find/Review
Process	Discussions, meetings, knowledge cafe	Notes, recordings, slides	Lists, tagged/linked content, FAQs	Guidelines, best practices

FRAMEWORK FOR IMPLEMENTATION

Goal: Develop a strategy and plan of action to facilitate sharing and capture of knowledge related to cybersecurity

	Discuss	Document	Synthesize	Find/Review
Technology	Online forum, video conferencing	Database, blog, repository	Research portal, wiki	RSS, search engine, feedback

FRAMEWORK FOR IMPLEMENTATION

Goal: Develop a strategy and plan of action to facilitate sharing and capture of knowledge related to cybersecurity

	Discuss	Document	Synthesize	Find/Review
Governance	Guidelines for discussions	Templates, content quality, standards	Taxonomy, meta-data, categorize	Scope and coverage

FRAMEWORK FOR IMPLEMENTATION

	Discuss	Document	Synthesize	Find/Review
People	Staff who work in cybersecurity	Librarians and library technicians	Experts or library staff	Practitioners and experts
Process	Discussions, meetings, knowledge cafe	Notes, recordings, slides	Lists, tagged/ linked content, FAQs	Guidelines, best practices
Technology	Online forum, video conferencing	Database, blog, repository	Research portal, wiki	RSS, search engine
Governance	Guidelines for group discussions	Templates, content quality, standards	Taxonomy, meta-data, categorize	Scope and coverage

Goal: Facilitate sharing and capture of knowledge related to cybersecurity



Strategy and plan of action

SUMMARY: MAKING KNOWLEDGE ACCESSIBLE & RE-USABLE

- Focus on what's important
- Turn intangible knowledge into tangible assets, e.g. FAQ, guidelines, best practices
- Catalog and make information searchable
- Connect people with each other
- Start small
- Leverage technology



YOU CAN DO MORE THAN YOU THINK!

THANK YOU

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BACK UP SLIDES

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BUT ...

What if your institutional culture is like this?

- Knowledge is power
- New staff must listen to older, more experienced staff
- Only way to learn is to work under more experienced staff (apprenticeship approach)
- Librarians should keep to their roles of managing the library and books
- IKM means implementing technology

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PROBLEM: GETTING BUY-IN/SUPPORT

People complain about needing to share information and improve our knowledge management but ...

- I cannot get anyone to support our plans
- My management is not interested (I cannot get them to pay attention/listen)
- My colleagues don't want to make any changes (or resist changes)

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OPTIONS: GETTING BUY-IN/SUPPORT

- Start small – demonstrate proof of concept
- Build your support group
- Find the early adopters
- Connect small successes to the big picture – get facts
- Get others to talk about the impact

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PROBLEM: LACK OF RESOURCES

- We have support but we don't have the budget, staff, time, etc. to do this
- Our IT group don't have the capacity to support our projects

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OPTIONS: LACK OF RESOURCES

- Start small, do things in phases
- Look for opportunities to collaborate
- Be creative

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PROBLEM: LACK OF KNOW HOW

- We don't know how to get started
- We don't have the right skills
- Our staff don't have the skills to ...

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OPTIONS: LACK OF KNOW HOW

- Ask questions, learn from others
- It is OK to experiment and learn from failure