Proactive Knowledge Management on an NFP Budget

Case Study: Port Phillip
EcoCentre 17-19

We're an environmental NGO.
Knowledge is our core business.

We centre on knowledge including teaching, researching, interpreting, and sharing skills and information among our staff, volunteers, participants and networks.

From our origins with one part time employee in 1999, the EcoCentre grew to employ a small team on a fixed-term project basis, with a goal of retaining staff through consecutive projects. Although this achieved some continuity in our skills, knowledge and relationship network, we struggled to find time to systematically keep records of repeated processes or specialised knowledge.

Staff, Committee and volunteers often started unceremoniously and figured things out on the fly, by observation, experimentation or research on personal time. Many mandatory practices relied on single, longstanding Committee members who instinctively knew what to do when, but this only worked if they could do it 100% of the time, and never got sick or took a holiday.

During a succession planning project, interviews and assessments with Committee and staff revealed 'knowledge management' as a weakness and staff agreed improving ICT was a priority for recording and sharing knowledge and information. To help us decide between a field of technology options, we invested in a consultant.

The consultant encouraged us to select ICT only after broader work understanding the interaction of our mission, relationships, and processes. They recommended a culture shift through practical actions to recognise and value knowledge as our core and distinguishing 'product':

"Recognising that the EcoCentre's core business is knowledge management will guide the effort and tools for much greater collaboration in future.... investing in people rather than buying equipment, creating value rather than budgeting for cost."

This shift in thinking triggered a range of improvements:
- Improving documentation via reducing ambiguity in language, making checklists and FAQs for repeated activities, and consistently labeled files and folders
- Increasing budget for training and ICT so it was proactive not maintenance
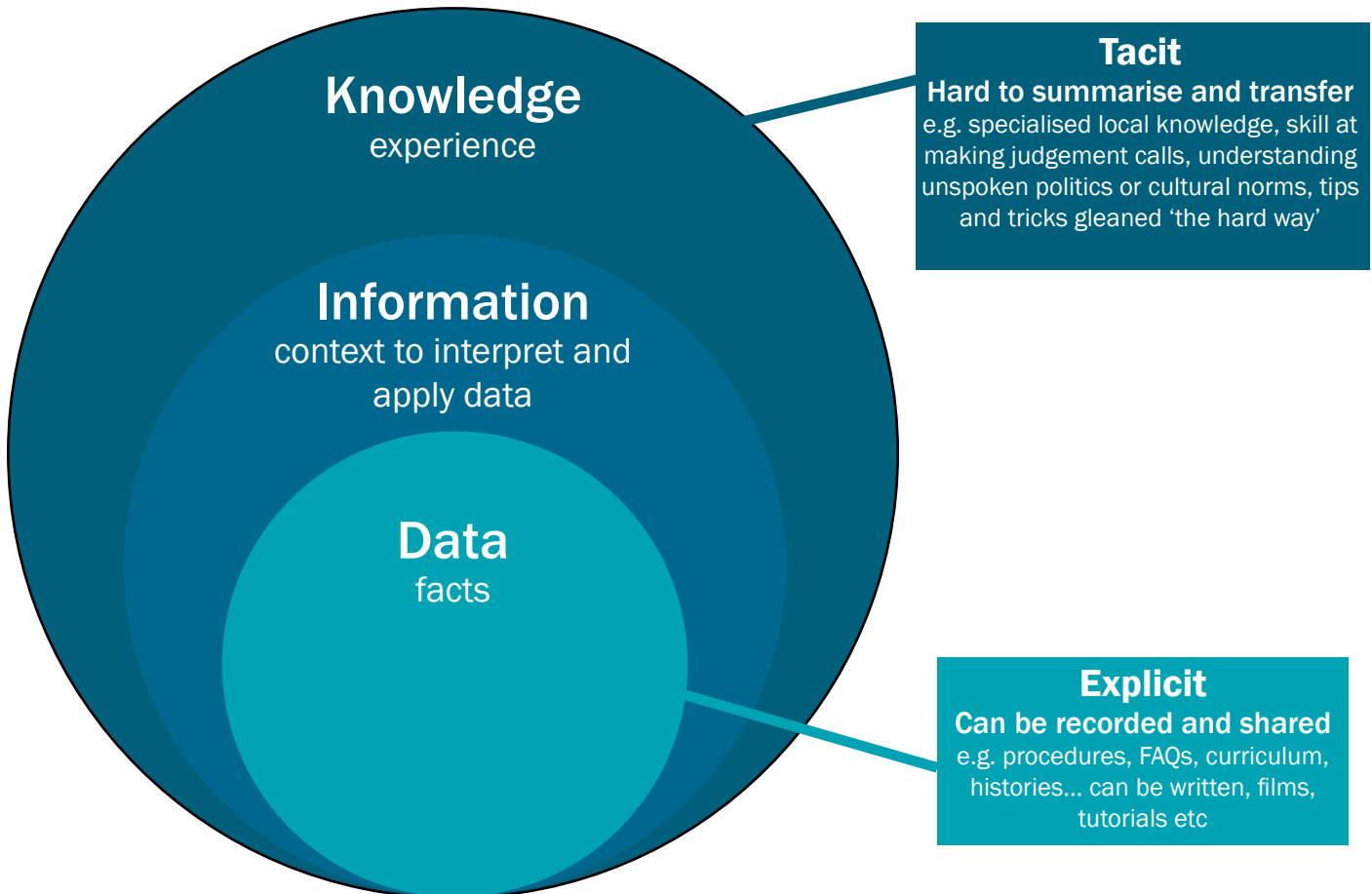- Investing in opportunities to share tacit knowledge

However, most tools for Knowledge Management implementation were either designed for large commercial organisations, broad philosophical statements insufficient to help an NFP decide practical first steps, or effective but costly consultations.

To offset costs and ensure suitable staff time was allocated, we designed a two-year project and secured support from Lord Mayor's Charitable Foundation.

We're now excited to share our learnings and frameworks for knowledge sharing to enable your NFP to invest in people and build knowledge to achieve your mission.

This guide may be useful if you:
- Are a small organisation (4-20 people between the Staff and/or Committee of Management)
- Budgets are tight and funding is often uncertain
- Welcome new staff, Committee of Management or volunteers.
- Your organisation's systems have evolved or are growing in a fairly unplanned, organic manner. Some are outdated or not optimally functioning for the organisation's current size and purpose.

Knowledge
experience

Information
context to interpret and apply data

Data
facts

Tacit
Hard to summarise and transfer
e.g. specialised local knowledge, skill at making judgement calls, understanding unspoken politics or cultural norms, tips and tricks gleaned 'the hard way'

Explicit
Can be recorded and shared
e.g. procedures, FAQs, curriculum, histories... can be written, films, tutorials etc

Knowledge Management related activities are now approximately 4% of our annual expenses.
Returns on this include:
- Easier induction and handovers
- Reduced risk of 'knowledge erosion'
- Fulfilling our capacity-building goal as a knowledge hub

It is our priority to record and share knowledge or information in-house or with networks if it:

Internal
External

- Supports a process that is commonly repeated or legally mandatory
- Assists the team to execute their work efficiently and effectively
- Reveals tips, tricks or context that otherwise are gained only via experience over time
- Is the requirement of a funded project or Annual Reporting
- Is commonly requested by the public, partner groups or participants
- Presents data or stories that will drive positive change
- Can benefit groups with similar organisational needs

Knowledge Management is the process of **capturing**, **distributing** and **effectively using** knowledge. (Tom Davenport)

Where to start

For each of these categories, we've noted an ideal option and a budget option, in consideration of the varied budgets non-profits have for knowledge management. Don't forget to budget for time, not just consultants or training registrations.

☑ **Identify the knowledge needed to execute your Strategic Plan and core activities.**

Best Option: Work with an external consultant to map this as a whole team.
Budget Option: Make your own table like below.

Strategy or Key Activity	Knowledge Needs	Information Actions	Whom to train
e.g. Tailored Engagement for schools, Scouts and new residents	• Victorian Curriculum and its application • Needs of schools and Scouts • Cross-cultural competence	1. Introduce to educators during induction (https://victoriancurriculum.vcaa.vic.edu.au) 2. Invite Scout and Teacher to present trends in their sector before our Strategic Planning 3. Exchange 'lessons learned' at team meetings 4. Seek funding for cross-cultural trainings	Education team All staff (ongoing) Staff & Committee of Management
e.g. Monthly weeding bee	• Plant identification • Boundary of site • Safety	1. 'Cheat sheet' of top 5 weeds, site tour and safety briefing during induction 2. Pair first time volunteers with a leader 3. Apply for grants for Plant ID / Weed Spotter training for group leaders	New volunteers Activity leaders

Where to start

☑ **Survey your team**

Best Option: Have an independent person interview and analyse themes in responses. A consultant did this for us ($2,000), and it solved delays had we prioritised more 'urgent' tasks.
Budget option: Use an online survey tool and paste the resulting text (answers) into a word cloud generator that will display the most common words larger.

☑ **Reflect periodically to encourage knowledge-sharing.**

Best Option: Commit 2 hours of time 1-4x per year as a group.
Budget option: Seek a grant to include reflections and knowledge-sharing as a preparatory activity to your Strategic Plan.

☑ **Create a formal induction table. Make staff, volunteer and Committee of Management versions.**

Best Option: Budget 1-2 weeks for new team members to be inducted and shadow others.
Budget option: Use a checklist for HR induction compliance, provide inductees with your Annual Report, and walk through ICT. Give a recommended reading list for their independent study.

☑ **Record FAQs and common activity run-sheets.**

Best Option: Do this yourselves. Brainstorm priority tasks and topics, then assign one person to write up and one to test.
Budget Option: Get a university intern to shadow you and write up the steps of your common activities – sometimes it's easier to edit an incorrect draft than to motivate starting from scratch!

☑ **Commit a training budget. If you do not have surplus find a grant. Your team survey should inform priority training needs.**

Best Option: Use a portion of your surplus to invest in this consistently, as a separate event to normal Committee, staff or project meetings.
Budget option: Commit in your Strategic Plan to seek a grant every year to fund a knowledge-sharing session within your organisation or network. Make 10 minutes at the end of each existing group meeting to discuss 'What tips, tricks and mistakes did we learn this month?'

Best Practices on a Budget

Knowledge management doesn't have to come with a hefty price tag. Through our knowledge sharing project, we identified and implemented a number of successful practices that worked well for us while containing expenses.

Practice / Tool	Resourcing	We use...
Shared calendar to book people, spaces and events	All users need access and to be walked through this when joining the organisation	• Google Calendar • Induction time to share relevant calendars and protocols
Shared cloud drive to ensure people can access the right information when needed	• Set up access during Induction • Make a simple file naming convention	• Dropbox • File naming convention
Induction checklist	• Time to concentrate and create one. • 2 hours to tweak it after each use when you notice omissions.	• Separate tables for Staff, Committee and Volunteers • One officer employed 2 days per month for HR
Recommended reading / viewing list	Fund 1-2 days for new staff to read internal (and external context-setting) docs & watch clips	A list provided at induction
Meeting time **(Try not to mix with project meetings/normal Committees.)**	We do one activity in our All-Staff meeting (monthly), Our biggest investment is 2 special Staff-Committee workshops each year. For us it costs around $8000 to employ the full team for 6.5 hours; but the return is immense.	We pair, then discuss as a group: • Most significant changes? • New tips & tricks? Any failures? • Map activities in a Venn Diagram with the categories: Amazing, Do not repeat, & both of the above. This helps us visualise learnings.
Failure cake, to dissect what went wrong with a focus on process not fault	• Money for a cake • Time for a solid conversation	A Monarch plum cake and a dose of humility. Such learnings are often tacit and either forgotten or strategically excluded from write-ups.
Shadowing	6 hours allocation per person p.a., paid to shadow (if approved)	Meetings and annual reviews to identify goals
Create a training budget	• Instructor fees • Time to participate	$1,000 per FTE, plus set a grants seeking target related to a particular focus issue

Key Lessons

Strategic Plans will determine priority activities, with required knowledge. Those knowledge goals, plus compliance laws, will guide priority information sharing actions.

Invest in people and processes first, then technology. Formally evaluate technology every 3 years to understand its effectiveness and identify new trends and platforms that serve our processes.

Guidelines are more accessible and less overwhelming than policy documents.

Shadowing and group meetings with discussion time are great ways to share tacit knowledge.

Start with interviews of all (or representative) staff, committee and key volunteers.

Challenge each other to articulate decision-making criteria.

The Knowledge Management process will be incremental, and only happen if groups formally schedule (and fund) it.

Reiterate a culture of reciprocity and sharing, such as through co-funding joint trainings and case studies.

Investing in Knowledge Management proactively reduces organisational risk and cost at times of handovers or backfills.

Ongoing partnerships and activities are less likely to be evaluated than one-off sessions or projects, so schedule their evaluation in a formal cycle.

The EcoCentre develops community-wide understanding of the Port Phillip Bay environment. We deliver specialist education, science-based research and community action projects. This work stimulates people to connect with their local habitats, to protect the environment and to influence decision-makers, so all life can flourish. We are a hub that links people and organisations. Our programs include teaching in schools, running seminars and excursions, conducting research and implementing on-ground activities.

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