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Inside KMPro Journal

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Call for Papers and Membership

For more information about membership or contributing to The Journal, please see pages 25.

FROM THE EDITORS – THE JOURNAL AS PLACE

By Deb Wallace and Mary Lee Kennedy

Welcome to the first issue of The Journal for 2009 and the second issue for us as co-editors. When we put together our first issue of The Journal last fall, the financial crisis was just unfolding. Now 6 months later, we all have a better understanding of what happened, but are still grappling with what the current environment means for each of us individually and collectively for our organizations, professions, and fields.

We wish we had a crystal ball to predict when the economy will turn around. But regrettably, that's not the case. Instead, we may have something that proves to be much more reliable for creating value – the collective wisdom of practitioners working in the field and academics defining and refining theory to further our understanding of knowledge management.

In This Issue

To highlight the power of learning and knowledge sharing, we offer a window into three very different environments that are using innovative structures/approaches and tools to increase their ability to put knowledge in play – to add value through effective knowledge creation, management, and use.

In the first article, Max Vecchiarino, an elementary school administrator, and Carol Rolheiser, a thought leader in teacher education, describe the use of learning communities as change agents to increase the probability of sustainable change. Their experience with engaging team members in a change effort in order to address concerns and position the change in the context of an individual has the added advantage of creating a vehicle for building knowledge.

David Hobbie, the Litigations Knowledge Manager, follows with an overview of how Web 2.0 tools are being implemented at a law firm. Usually seen as conservative technology users, lawyers rely heavily on expert knowledge and information to practice. David gives us insight into the use of collaboration and knowledge sharing tools at Goodwin Procter LLP where blogs and wikis in particular have been embraced to enable knowledge management initiatives. He provides an overview of the wide variety of uses for Enterprise 2.0 tools at the individual, team, and enterprise levels, offering lessons learned on how to successfully implement these tools to enhance professional practice.

In the last article, a team of practitioners working in the Canadian Federal Government's School of Public Service outline the consulting practice they've built to support the development and implementation of communities of practice across the civil service. We see a team that models knowledge management principles, emphasizing the need for big picture thinking and supporting a culture of knowledge sharing.

Michael Novack and Jane Dysart wrap up this issue with an overview of a KM Conference on knowledge retention held last fall, plus a preview of the upcoming KM World Conference slated for this November.

Journal as Place

Sustainability continues to be a challenge for most organizations – products and services come and go as customer needs and priorities change, senior sponsors/champions move on, and workforces morph into new structures to support different products and services approaches.

Our work with The KMPro Journal is a microcosm of what we see in the larger workplace. Like many volunteer organizations, we are challenged to find people willing to commit time and effort to contribute to The Journal – we're all busy. Many of us are in situations where work demands have increased while resources have decreased. So the familiar challenge to *do more with less* is more than ever a reality for most of us. We've seen whole companies disappear, units dismantled, and early retirements erode teams and departments. At the same time, we juggle personal and family needs in the never-ending quest for a sane work/life balance.

A recent Toronto Globe and Mail Report on Business article on workplace democracy (a systematic approach to gain employee input to fuel innovation) presents an interesting possibility for leveraging employee knowledge. Reported benefits include: implementable incremental, quick wins; increased employee engagement; and frontline, customer needs heard loud and clear. An I Love Rewards Inc. manager states, "It's like a breath of fresh air. I've worked at large companies where people like me get frustrated with all the red tape in presenting a good idea. Here, I know I can make an impact."

(See [www.theglobeandmail.com/report-on-business/workplace-democracy/article1161487 - visited May 30](www.theglobeandmail.com/report-on-business/workplace-democracy/article1161487), 2009)).

Like the suggestion box of old or The company intranet wiki of today, we offer the Journal as a place to share ideas and experiences; to keep our thinking fresh with stories of innovation – lessons learned from the field and being tested in building theory, know that you too can make an impact.

We'd like to review our original thinking about the proposed direction for The Journal:

Purpose Statement: The Journal's core purpose is to help its readers and KMPro Society members understand the work of knowledge management in the context of four key focus areas as identified in Khurana's discussion of professional communities:

- Shared expert knowledge
- Standards of practice
- Value creation and contribution to the organizations in which the practitioners work
- Norms of conduct.

(See Khurana, R. 2007. *From Higher Aims to Hired Hands*. Princeton University Press.)

Audience: The journal aims to appeal to a broad, international KM audience with a primary focus on practitioners.

Format: In the short term, we will continue with the current format as a downloadable object from the KMPro portal site at http://kmpro.org/static.php?file=journal.htm. However, the goal is to move it to a more dynamic, reader-generated information source where content is contributed on a more frequent basis, reflecting current organizational challenges and highlighting value-created based on practitioner insights.

Content: Primarily the content should further our knowledge about KM theory and practice, with an emphasis on practice and a practitioner's perspective on the value KM provides in a wide range of organizations. It should provide current awareness of KM professional development opportunities and approaches.

In each issue we will aim to include content aligned with the framework components outlined in the purpose statement within the following “sections”:

- Editors’ Column
- New Knowledge – key themes and overviews of conferences presentations and proceedings
- Article(s) on KM concepts/theory (thought leadership and research)
- Practitioner case studies – in depth and thumbnail combination
- KM information on the Web – new key resources (with commentary from the author/originator)
- KM vocabulary.

Our original call to The Journal audience remains the same. We encourage you to give us your feedback on the proposed direction for The Journal. We also encourage you to identify topics, themes, and trends that you’d like to see covered in future issues. Propose a challenge that you’d like input on from our wide range of readers. Share your expert knowledge – your insights gained from experience when creating organizational value from a knowledge transfer or sharing initiative. Offer advice on norms of conduct for knowledge management professionals. Report on your research findings in the exploration of KM principles and concepts.

We’re looking for a wide range of content – from an idea just starting to formulate to a fully realized research article. Please submit your thoughts to us at: editor@kmpro.org.

About the Editors

Deb Wallace, PhD
Deb has held a variety of positions in the private and public sectors, but the central theme in all her work has been building capabilities and putting them to work. Deb speaks widely on knowledge and learning in the workplace, has authored numerous articles on organizational learning, and co-authored *Leveraging Communities of Practice for Strategic Advantage* with Hubert Saint-Onge (Butterworth-Heinemann, 2003). She continues to research the role of collaboration and communities in building knowledge and has assisted numerous organizations with their strategic planning, community development, and knowledge sharing initiatives.

Mary Lee Kennedy, MLS
Mary Lee has global leadership experience in multinational corporations, governments, and higher education. She specializes in the formulation and implementation of practical information and knowledge strategies that deliver organizational and performance success. She achieves this through strategy development and business planning, product and service portfolio creation and alignment, organizational capability planning and alignment, business process improvement, cross-organizational engagement and relationship management, information and knowledge identification and integration, and effective and efficient information technology application. She is an experienced practitioner with significant expertise in high technology, professional services, research, manufacturing, and academia. She recently edited *Intranets for Info Pros* (Information Today, 2007).

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ABOUT KMPRO

The Knowledge Management Professional Society (KMPro) is an international professional society headquartered in the Washington, D.C. area and is the world's largest KM society with more than 120,000 members in 88 countries world-wide. It is a non-profit, member-driven community committed to promoting knowledge management (KM) worldwide, with membership available for those interested in KM.

We are a society created by KM Professionals and for KM Professionals actively engaged in KM implementation, Change or Information Management, Innovation, Human/Intellectual Capital Strategy, Intangible Asset Valuation. KMPro welcomes both those new to KM and experienced practitioners.

We serve the professional needs of the broad KM community through a variety of training, collaboration, networking, mentoring, partnerships, publishing, advertising opportunities. We also offer our CKM certification graduates with the opportunity to collaborate and network.

We are 100% member-driven, locally and globally, working together to invigorate the KM community. KMPro is an INCLUSIVE organization, and one of our goals is to form strategic alliances and partnerships with those organizations who share our vision, ethics, values and beliefs. We openly seek and promote collaboration with other organizations when such a partnership would provide benefit to our members and would support our vision.

In support of our goals to advance KM and professionalism in the field of KM, KMPro offers opportunities for KM certification, career assistance and networking.

KMPro is the leading certifying body and largest international association dedicated to knowledge management and its Knowledge Management Certification Board (KMCB) was formed in 1999. In support of our goals to advance KM and professionalism in the field of KM, KMPro offers opportunities for KM certification including the Certified Knowledge Manager (CKM) certification, as well as the Certified Knowledge Management Professional (CKMP) and Master Certified Knowledge Management Professional (MKMP) certifications. KMPro has also begun work on establishing its KM certification at the organizational level with its new "Certified KM Organization" (CKMO)™, and its international KM organizational award program will begin in 2008. Hudson Associates Consulting, Inc. is the sole provider of the Certified Knowledge Manager (CKM) for KMPro and is the originator of the CKM program.

Members also have access to our KMPro Career Center where members can post resumes, and organizations seeking to hire those with KM expertise can post KM job listings which are made available via our KM-Jobs listserv. We're in the process of conducting the world's first global KM Salary and Benefits survey, and will publish those results once the survey is complete.

Networking and collaboration opportunities are available through member only chapter meetings (80+ chapters worldwide), events, online activities, KMPro's LinkedIn Group, and exclusive Certified Knowledge Manager (CKM) Network.

For questions concerning membership, contact the VP of Member Services at membership@kmpro.org. For questions regarding our training services, please contact your Certification Coordinator at 866-31-KMPRO (866-315-6776) Outside U.S. 757-460-6500, or training@kmpro.org

Our purpose is to encourage the practice of knowledge management, reflect the diversity of thought found in this growing field, and disseminate the best ideas and tools from the many disciplines that facilitate organizational learning and improvement.

KMPro is incorporated within the State of Maryland, and is governed by its laws. Our Governance webpage contains our By-Laws. Ultimately we will provide available to members copies of board and meeting minutes when a secure member area is available.

LEARNING TEAMS AS AGENTS OF CHANGE AND KNOWLEDGE BUILDING

By Max Vecchiarino and Carol Rolheiser ©2009

Abstract: Challenged with successfully implementing changes that are sustainable over time, professional learning communities have been established in some educational settings to create a clear and shared understanding of a proposed change, implement a form of distributed leadership to manage favorable conditions, and engender an openness to possibilities and a willingness to work collaboratively among its members. Using Learning Teams as an organizational structure, cross-functional participants create a culture of innovation when they understand the impact and benefits of a proposed change as well as their individual goals in implementing a new practice. A versatile vehicle for enabling successful adoption, Learning Teams can add to the toolkit of knowledge and learning professionals in almost any setting.

Key Words: Change Agents, Change Management, Learning Teams, Organizational Learning, Professional Learning Communities

The Challenge

Cecilia, the owner of a large travel business, often talks about the difficulties she encounters when faced with the prospect of implementing new policies, regulations, and practices in her organization. "A number of the staff are usually resistant or disinterested." Then she adds, "Of course, the ***doers*** *are always immediately on board, but they're not the ones I am concerned about. How do I get those who balk at putting into practice sensible changes to understand the value and importance of what we are trying to do?"*

Sound familiar? How many of us face similar challenges in our workplaces? Don't we all wish we could simply adopt, or at least consider, novel ideas, programs or mandated measures without facing implementation challenges?

Context for Change

In the context of elementary education, teachers and administrators are regularly asked to take on new ways of doing things. Whether it's because of political forces or because school districts and departments or ministries of education feel that change is required for other reasons, elementary educators face ongoing pressure to adjust their practices, often at a dizzying pace. As well, change isn't always supported in such a way that *all* school-based staff are given sufficient opportunity to integrate new requirements into their programs.

Frequently, funding is available only when an initiative is first introduced, followed by implied expectations that ongoing support and execution will take place at the local school level. Moreover, field testing measures are habitually limited in nature, resulting in difficulties in terms of fidelity of implementation.

In addition to externally mandated change, educators also manage changes that they themselves initiate at the local level. Most often these changes are considered because the educators deem them to have possible benefits for their students, school and/or community.

When externally mandated changes and locally initiated changes combine, *change as* *the norm* results. As Michael Fullan, international authority on educational reform, notes:

> It is no longer sufficient to study factors associated with the success or failure of the latest innovation or policy. It is no longer acceptable to separate planned change from seemingly spontaneous or naturally occurring change. It is only by raising our consciousness and insights about the totality of educational change that we can do something about it. (1993: vii)

In order to respond to this complex context, and to support both implementation and a culture of innovation in order to improve student achievement, many educational institutions are implementing a knowledge generating and sharing structure called a professional learning community (PLC). Williams, Brien, Sprague, & Sullivan (2008, p. 1) define a PLC as follows:

> While there is no universal definition of a professional learning community, an international review of the literature indicates that PLCs appear to share five key components: shared values and vision, collective responsibility, reflective professional inquiry, professional collaboration, and promotion of group and individual learning (Stoll, Bolam, McMahon, Wallace, & Thomas, 2006). Schools where these components are combined to focus on student learning are more effective in sustaining improved student achievement (Bredeson & Scribner, 2000; Louis, Toole, & Hargreaves, 1999).

Learning Teams

Through PLCs, teachers and administrators collaborate to ensure that the work they do is both meaningful and authentic, for them and the students they serve (Toole & Louis, 2002). A structural approach that can contribute to the creation of a PLC, and a microcosm of it, is the Learning Team. Most simply, the Learning Team is a group of teachers and/or school administrators who come together on a regular basis to consider research- and experience-based practices and their potential benefits, as well as the potential application to particular contexts.

Through Learning Teams, elementary educators consider the impact of any changes they are asked to adopt or that they themselves are considering, and work to ensure their efforts result in the successful implementation and sustainability of new legislation, policies, materials and/or instructional methods.

Three factors, described in more detail below, are central to the efficacy of Learning Teams:

- A clear and shared understanding of the change that is potentially being undertaken
- Distributed leadership that will provide supportive conditions for the change to be incorporated effectively into existing frameworks
- Certain dispositions on the part of those involved with the change process.

These factors, though presented here through the lens of elementary education, are easily transferred to other contexts, and provide a simple, though not simplistic, approach to managing change and adopting new knowledge.

It's never easy to bring about substantive change. A key reason for this is that the people being asked to change have, more often than not, disparate understandings of what they are being asked to do. Coupled with different levels of ability and motivation, it stands to reason that the process of implementing change is non-linear and must include at its very core the opportunity to support numerous and varied stakeholders. Additionally, even when the change is one that is desired and/or initiated by the implementers, developing a common understanding of the initiative can be a complex undertaking. Learning Teams are vehicles that support implementers in making sense of the change and can increase the chances that the emergent knowledge has valid applications to professional practices.

Learning Team members, typically 6 to 8 teachers and 1 or 2 school administrators, begin their work by having clear models of what the change entails. For example, if implementing small group cooperative learning as an instructional approach, the team would have seen models of cooperative learning, know its benefits, and so forth.

The goal is to increase the probability that team members begin the work together by developing a shared understanding of the proposed change. In this way, adoption of the change has an increased likelihood of success. Vecchiarino (2006) found that without clear and common understandings of the practices being considered for adoption, the probability of their successful implementation was diminished. Educators, like other professionals, want to feel that new practices will improve their work. They can't improve their work if they don't understand what is being asked of them or what their individual goals are in the adoption of new practices.

Sustaining Success

In *Implementing Change: Patterns, Principles, and Potholes,* Hall and Hord (2006) reinforce this need for understanding, by devoting a great deal of emphasis to the Concerns-Based Adoption Model (CBAM). CBAM is an implementation model that explains and predicts the behaviors and concerns of people involved in a change process through three principal dimensions:

- **Stages of Concern** – Seven stages of feelings and perceptions that are experienced when implementing a new program or practice
- **Levels of Use** – Eight behavioral profiles that describe a different set of actions and behaviors which are linked to the process of becoming more familiar with and more skilled in using an innovation or adopting a change
- **Innovation Configurations** – Different ways an innovation may be implemented, shown along a continuum from ideal implementation or practice to least desirable practice.

The last dimension of CBAM, Innovation Configurations, points to the importance of fidelity. It reinforces the need for a germane attempt at carrying out an innovation in the way it is intended (particularly in terms of structure) without which an innovation has limited chances of long-term, sustainable success. This isn't to argue purely for alignment, as this may constrain creativity and limit the opportunities for growth and the creation of new and exciting knowledge. Rather, it's a case for ensuring that the 'starting points' of a change are commonly understood by all participants, so that,

collaboratively, implementers may devote their efforts to an analysis of the potential efficacy of the change being considered, and of the applicability to their shared context.
In terms of elementary education, this process is illustrated whenever a school district makes the decision to implement new policies and/or practices. If teachers and administrators are not 'on the same page,' in terms of both their current status vis-à-vis the new plans and of the outcomes toward which they are working, then effective implementation and subsequent sustainability is unlikely. Moreover, the efforts may even serve to engender negativity (Smaller, 2005), in that teachers and administrators may feel that the change they're being asked to undertake is 'yet another new *thing* for them to do, ill thought-out by central (head) office, with no *real* application to classroom practice – just another idea that, eventually, will pass!'

Sound familiar? Learning Teams work toward avoiding this pessimism, by giving all members a voice and an opportunity to clarify the change at the early stages, and by ensuring that members of the team can work toward individual and collective understanding of the change. A skillful facilitator can ensure that terms, procedures and intents are clearly established at the onset, by encouraging members to interrogate these norms until there is a common understanding from which to move forward.

Leadership Engagement

Learning Teams don't operate in a leadership vacuum. As a matter of fact, they're reliant upon good leadership. However, the leadership of the team isn't dependent solely on the formal leadership provided by the school or district administration. Recent work in educational research has heralded the importance of teacher leadership (e.g., Murphy, 2005; Patterson, 2003) and distributed leadership (e.g., Mascall & Rolheiser, 2007; Spillane, Sherer & Coldren, 2005). While "the empirical evidence of its benefits remains limited" (Harris, 2006, p. 64), it's clear that the boundaries of traditional school leadership are being pushed.

One of the authors' findings is coherent with this position. In a small qualitative study, Vecchiarino (2006) found that while the involvement of formal school leadership (administration) was integral to the success of a Learning Team's work, this success was equally dependent on the genuine buy-in of its participants. In other words, the leadership of a Learning Team is complex. It requires elements of more formal leadership models, but it also doesn't function effectively without the genuine interest and involvement of other members of the team – teachers. Building on the position established earlier, which focused on the importance of ensuring that all members have a common understanding of the team's objectives, it's equally crucial that all Learning Team members feel that they are important participants in the work they will do together.

Creating Meaning – Individual and Team

An example of this type of collaboration (once again drawn from the life of an elementary school, but easily applicable to other environments) can be seen in a Learning Team's efforts at implementing a new practice in literacy instruction. A school's administration outlines the new literacy practice to the teachers affected by the change (likely at the behest of the central office). Discussion within the Learning Team focuses on the merits of the practice (e.g., support for improved student performance by external research and school-based experience). But, and this is key, the members of the team need to feel that they have the power to make sense of the new instructional approach in terms of their own setting. If they don't feel that they have the authority and leadership to make decisions about the implementation of it based on their own context(s), the new practice will most likely not be implemented, or if implemented, the practice isn't likely to be sustained over time.

Of course, some team members will take on the challenge and try it readily, while others will resist, at least initially – these are basic elements of the change implementation process. What we're suggesting goes further. Team members will implement new practices only if they feel they have the power to make decisions about them (e.g., analyze them, critique them) in an authentic and meaningful way. The Learning Team provides the forum for exercising this type of individual leadership, and can support the implementation of the literacy practice by allowing participants to adopt the new ideas in a manner that suits their needs, which, ultimately, will lead to greater chances of long-term success and sustainability of the instructional practice.

The Learning Team structure not only supports its members in establishing clear and manageable ground rules and logical beginnings, it also, supports the group as a whole in exercising positive control over the roll out of the initiative they've undertaken or are being asked to implement at the local level. The Learning Team achieves those ends by both valuing and engendering certain dispositions on the part of individual participants; these dispositions ultimately support and develop the work the group as a whole is undertaking.

Vecchiarino (2006), working on an analysis of elementary school-based Learning Teams, outlines two primary dispositions that serve to make the team's work more productive:

- Openness to possibilities
- Willingness to work collaboratively.

Together, these dispositions characterize members of Learning Teams as professionals who demonstrate *the willingness to embrace possibilities in a collaborative work setting.* Without these dispositions, Vecchiarino (2006) argues, the work of Learning Teams is considerably less effective and initiatives are much less likely to move forward and be sustainable over the long term. In other words, while clarity of starting points and opportunities for individual leadership are integral to the buy-in of participants, it's also essential that Learning Team members manifest certain characteristics (which can be cultivated) so that the work of the group will move ahead in a purposeful manner.

To round out our discussion with a final example from elementary education, let's think, once again, about the Learning Team engaged in making sense of the merits of an innovative practice in literacy instruction. No matter how well-organized the school district's plan, or how well-intentioned the school's administrative team, meaningful change is unlikely to occur if the team members aren't genuinely open to the ideas being presented and willing to work on them collaboratively with colleagues.

Two important philosophers of education elegantly reinforce the arguments we've put forward in this article. Greene, in a sort of call to action, asks us not only to clarify our positions, but also to commit ourselves (for commit read *leadership*) collaboratively (her repeated use of the word *we*), openly and willingly (her use of the words *heed* and *work*) with the following:

> We have to know about our lives, clarify our situations if we are to understand the world from our shared standpoints, … ready to commit ourselves to small transformations as we heed the stories, the multiplex stories, as cautiously we work to transform. (1995, p. 21)

Referring to Peggy Phelan's work, Ellsworth uses the analogy of a bridge:

> Phelan writes of the rickety, uncrossable bridge between self and other…. She does this in hope of shattering the illusion of arriving at one side or the other of this suspended bridge - an arrival that, if it were even possible, would stop the performance, solidify and fix the teacher and the student and knowledge into the selfsame. (1997, p. 163)

With these words, Ellsworth reminds us of the value of the 'attempt,' of the fact that when we work together we have to be amenable to the *possibilities* alluded to earlier. After all, if we hope to move ideas further, we can only do it if we work willingly and honestly with others, hopeful that, together, we'll build and manage greater knowledge than that with which we began.

Conclusion

Learning Teams provide one possible vehicle to build capacity for on-going growth and knowledge-building. They allow participants, by working with others, the opportunity (to use a phrase oft-employed by Fullan) to be both *on the balcony*, looking at their work from the vantage point of professional conversation, and *on the dance floor*, actually doing their work and reflecting on it.

In today's complex settings, in which new knowledge is managed and created in increasingly novel and multi-layered ways, the Learning Team can serve as an effective vehicle by which professionals can experiment with and refine ideas in relation to their day-to-day work, in a setting that is challenging, stimulating and real.

Cecilia has decided to give Learning Teams a try. Every Monday morning, from 8 until 9, before the start of business, various groups meet – a different one every week, and she is always in attendance. In the teams, they discuss potential ideas, emerging trends, and other topics of interest to their particular group. They are respectful of one another, but they don't shy away from confronting difficult issue. Specific client files or internal processes are always at the core of their conversation – it's never idle chatter or, worse, an opportunity to gripe about what others are not doing. Will their actions result in everyone buying in to this structure for continuous improvement? Hopefully! At the very least, for now, they are providing the opportunity to dialogue in ways that are inclusive of all voices – a good starting point toward building consensus and potentially, greater knowledge.

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Carol Rolheiser is a professor in the Department of Curriculum, Teaching and Learning, former Associate Dean, Teacher Education at the Ontario Institute for Studies in Education, University of Toronto, and incoming Director of the Office of Teaching Advancement, University of Toronto (July 2009). Her publications and work with a wide range of educational organizations locally and internationally have focused on instructional and assessment innovation, teacher development, school improvement, leadership, teacher education redesign, system reform, and managing education change.

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ENTERPRISE 2.0 AT GOODWIN PROCTER

By David Hobbie © 2009

Abstract: Although often seen as conservative technology users, lawyers rely heavily on knowledge and information to practice. One of the early adopters of collaboration and knowledge sharing tools, Goodwin Procter LLP has embraced blogs and wikis in particular to further their knowledge management initiatives. This article provides an overview of the wide variety of uses at the individual, team, and enterprise levels, offering lessons learned on how to implement Enterprise 2.0 tools to enhance the practice and business of law.

Key Words: Enterprise 2.0, blogs, wikis, knowledge sharing, collaboration

Introduction

The law is a knowledge-based endeavor. Lawyers draw on complex sets of rules, in statutes or in series of judicial decisions, to determine the best course of action in business or at the bar. Clients ranging from Fortune 100 corporations to the poorest tenant facing eviction depend on their lawyers' depth of knowledge. Lawyers are valuable primarily for their judgment, informed by years of experience and study, about what a court is likely to do in their case, and about the best course of action for their clients.

Despite the centrality of knowledge and information to lawyers' work, law firms are historically considered somewhat conservative from a technology and knowledge management perspective, perhaps because so much of law school training focuses on precedent (historical decisions). As Parson (2004) notes: "…technology consultants to the legal industry...almost universally express concern about the state of law firm knowledge management." Nonetheless, some law firms are beginning to adopt some of the new collaboration and knowledge-sharing tools that arose out of sophisticated internet platforms that have collectively been labeled "Enterprise 2.0" when applied at organizations "inside the firewall."

After laying out the similarities and differences of Enterprise 2.0 and knowledge management, this article focuses on the use of wikis and blogs in one such law firm, the newly international Goodwin Procter LLP.

Enterprise 2.0 vs. Knowledge Management

Knowledge management addresses processes around knowledge capture, storage, and transfer. (Davenport and Prusak 1997) For purposes of this article, I focus on knowledge management practices rather than on how it might be defined. Knowledge management encompasses a wide variety of activities, including:

- Establishing collections of best practices and documents
- Empowering communities of practice
- Developing enterprise-wide taxonomies.

Many historic knowledge management projects entailed teams of knowledge managers pulling together centrally vetted and organized collections of samples, forms, checklist, and other useful work product that resided in a "KM database."

Harvard Business School Professor Andrew McAfee suggested in his seminal article “Enterprise 2.0: Dawn of Emergent Collaboration” (McAfee 2006) that such knowledge capture activities fall into two types that each have a significant limitation.

With *channels* such as email and document management systems, all knowledge workers can be authors, but the resulting content is not readily accessible to other knowledge workers. Emails, for instance, are not normally accessible to anyone but their immediate recipients, who must sort through or search a tremendous volume of other such items in the same channel.

On *platforms* such as corporate intranets or traditional knowledge management systems, information and knowledge is more visible, but authorship is limited, through role-based limits on who can add content or through extensive vetting. Contributions to the body of knowledge had to respect the taxonomies and structures put in place in advance, or were limited to those of the specialized knowledge managers.

In other words, knowledge workers contributing to *platforms* had to leave the flow of their normal work, if they could at all. Knowledge workers used *channels* in the normal work flow, but did not capture their work in a way that makes it accessible to other people.

McAfee coined the term "Enterprise 2.0" to identify systems that combined the power of distributed authorship of traditional channels and the accessibility and visibility of platforms. He used the acronym SLATES to identify key attributes of the tools he saw in use, for Search, Links, Alerts, Tagging, Extensibility, and Signals.

Search

At a basic level, search allows access to the content in these systems. Most Enterprise 2.0 systems have search built in to them as an essential component. Relying, as most of them do, on web technology, they are readily searchable by any decent search engine.

Dissatisfaction with search on firm intranets is quite high in comparison to internet search. Nearly 3 of 5 organizations are "not really satisfied" or "not satisfied at all" with intranet search. (McConnell 2007) The average consumer satisfaction rate with internet search was 80% in 2008 while Google's was 86%. (University of Michigan, 2008)

McAfee noted that the success of internet search engines like Google is based in large part on a dense link structure that reflects people’s opinions about what is valuable and useful.

Links

Easy creation of links between content by a wide group of people not only makes the content easier to navigate, it also has the potential to greatly enhance the searchability of the content.

If a larger group of people can link together all firm resources accessible via URL then intranet search should improve.

Authorship

Broader authorship and visibility of authorship can greatly enhance knowledge-sharing, not just by providing a place to author content, but through direct editing as in a wiki, adding structure and meaning through tagging, or through adding comments to a blog post.

Signals (Alerts)

Enterprise 2.0 applications have greater ability to communicate changes in content. (Cornelius 2008, p.1) They can send alerts on a change in content. A normal document management system tracks changes and stores versions to documents, but lacks the ability to alert people who might be interested in changes. Through an email or RSS "subscription" or feed, a wiki or blog tells those signed up that a document or post has been changed, and usually also indicates who did it.

Two additional aspects of McAfee's paradigm of Enterprise 2.0 are *Tagging* and *Extensibility*, which have not been implemented at my firm.

Business Value

While Enterprise 2.0 is not the same as traditional centralized knowledge management, it offers much of the same business value as KM. In particular, as seen at my law firm, Enterprise 2.0 offers more knowledge capture, more knowledge stored, and more knowledge transferred.

Enterprise 2.0 tools share a key feature with their Web cousins. Unlike traditional document collections, which suffered on occasion from "clutter" and got more cumbersome as they grew, these new tools get better as more people adopt and use them through the "Network Effect." As people add content, they also add structure and context.

Wikis are Easy

The inventor of the first wiki, Ward Cunningham, described it as "[t]*he simplest online database that could possibly work*."

Wikis are easy to edit web pages. It is easy to look at previous versions, as every save makes a new page version. There is normally no intermediate review of edits. Rather, errors or oversights are left for the next editor to fix – who can simply revert the wiki page to a previous version if the edit is completely wrong or the page vandalized. It is easy to transmit a wiki page. Every save can notify subscribers that a change occurred (and, in better platforms, the notification shows you the change that just happened). It is also easy to link between sets of pages. Wikis are special from a knowledge organization perspective in that users may easily edit the structure of the set of pages as well as the content of the knowledge repository.

Wikis are widely considered "One of the most promising enterprise 2.0 technologies for knowledge management." (Cornelius, 2008)

Wikis at Goodwin Procter

Goodwin Procter currently uses the SharePoint or MOSS 2007 "out-of-the-box" wiki platform. The SharePoint wiki platform is notable for the ease with which users can start to edit and create new pages. Simply putting double brackets around words creates new pages or links existing pages. While the notification and simultaneous editing features are weak, it has a powerful categories feature that lets users assign metadata to each page, and then organize sets of the wiki pages through the metadata.

Goodwin Procter has found many uses for wikis. Wikis have served us as:

- Legal encyclopedias
- Administrative project management tools
- Intranet resource pages
- Knowledge-sharing devices for the discovery phase of litigation.

Wiki adoption as measured by number of wiki pages has grown from around 200 in April 2008 to more than 1100, with many wiki projects in the pipeline.

Legal Encyclopedia

Goodwin Procter's Business Law Department has leveraged wikis in the first phase of a "Corporate Knowledge Tree" project. It contains a collection of materials, forms, and resources related to corporate representation and corporate transactions. Currently the materials reside on 89 "native" wiki pages covering topics ranging from shareholder vote packages to corporate deal forms. Topic responsibility is assigned to teams of partners and associates. Development of a custom knowledge-sharing and display tool using the content developed in the Corporate Knowledge Tree is in process.

Goodwin Procter has also leveraged wikis in the Litigation Department through a "Civil Procedure" wiki. Topics such as "subpoenas" or "summary judgment" are comprehensively addressed through a variety of sources, such as the Research & Library Services resources (e.g., treatises), know-how of our Court Procedures team, and knowledge management-developed resources such as collections of sample work product and preset searches of our litigation work product database, West KM. The wiki focuses on federal civil procedure since that is the topic of broadest application across the 8 United States offices of the firm (the firm also has offices in Hong Kong and London, albeit without litigators). The civil procedure wiki pages are categorized and can be viewed by three facets of civil procedure; rule, stage of the case, and jurisdiction.

Smaller groups, such as the National Security and Foreign Trade group, are also using wikis to gather detailed information about a broad range of topics. In that wiki, pages organize advice related to specific countries, and also hold information about the Firm's work with United States trade statutes and regulations.

Project Management

The KM team and other administrative areas have found wikis an effective project management tool. On the KM team wiki, each small project has its own page; larger projects have subsidiary pages. Project pages are tagged to the KM team members involved, and with a status such as "Active" or "Completed." These categories make it easy to view sets of wiki pages such as those tagged to an individual with an active or completed status.

I use my own wiki page on the KM team wiki as a personal knowledge management tool and as a way to share the value of the work I am doing for the firm.

Beyond the KM team site, project management wikis have sprung up where people from widespread offices and administrative teams need to rely on a continuously updated set of information. One example is the First Year Orientation wiki in which a broad geographically dispersed group of people share and keep up the dates and events for the different offices, groups of new fall associates, and departments. Project materials and wiki will be reused as appropriate for each year's project.

Intranet Pages

SharePoint wikis can be used to replace "regular" intranet web pages that have little more than text and a few links, and have the advantage of greater ease of editing once set up. One example is the Firm's Continuing Legal Education (CLE) program. The CLE managers do not need to find a tiny drop-down arrow in an obscure corner of a page and then perform several more sometimes-baffling operations to update these pages; rather, they click a large friendly "Edit" button immediately above the text, type, and hit "Save."

Discovery Wiki

Goodwin Procter has also successfully used wikis to help teams of attorneys in the flurry of factual discovery share and manage the knowledge.

A quick word about discovery may put this use case in context. In the United States, the normal presumption is that there should be no surprises at trial, and that parties to a litigation should therefore have extensive access to each other's information through what is called the "discovery process.” The scope of discovery in federal courts is "any nonprivileged matter that is relevant to any party's claim or defense." (Federal Rule of Civil Procedure 26). Typically parties will request each other's documents and seek documents from third parties, with lawyers reviewing documents, deposing potential witnesses, and trying to understand all of the facts relevant to that particular legal situation. "Documents" in this context means anything from hard copies to email to the contents of multiple hard drives or fileshares, so the quantity of information produced and reviewed can be vast.

Wikis are ideal for the process of boiling down this soup into a comprehensible and well-organized set of facts. Wiki pages can readily be established on the key issues facing the team. Discovery teams can also leverage wikis to assist them in their review, for instance, by identifying commonly used acronyms or key players. Geographically diverse teams can all contribute to the same wiki page, and managers can know that the page they examine at any time represents the latest thinking of the review team on a given subject, such as an entity's organizational structure or who might have useful information.

Discovery wikis tend to have many edits by many different people. Due to the large number of facts that the teams are addressing, up-front organization is particularly important.

Blogs Are Easy

A blog is a webpage that allows you to easily publish new information, presented in a chronological manner. Users obtain notifications of new information being added just as they can with a wiki. A blog gives lawyers or other Firm employees the ability to quickly capture knowledge and publish it. As a result it is available for others to find. Lawyers are used to writing letters and sending them out, which is essentially the same process as a blog.

The other feature of a blog that makes it a more powerful communication tool is the ability of others to participate in the blog through comments. The post and comment become captured elements of the collaboration and communication.

Internal Blogs at Goodwin Procter

At Goodwin Procter, blogs serve a variety of knowledge management and communication functions, and are found at the firm-wide, department, practice area, and smaller group levels. Blogs are used to:

- Spread and store administrative and "how-to" information
- Let small practice teams share information that otherwise would go out over email
- Serve as a knowledge repository in fast-developing areas of law and business such as the financial crisis.

SharePoint "native" blogs, like wikis, are readily indexed by the product's built-in search.

Firm-Wide

The KM blog "Around the iNet" provides updates and information about our Firm's intranet, the "iNet." Notice of new posts are provided by email, but they are also stored and available in "pure" blog form on the iNet's home page.

Department

My internal blog "Case Knowledge" focuses on litigation knowledge management topics such as discovery wikis, personal knowledge management, and publicly available RSS feeds of court decisions. Its content applies to the whole Department. (I also have an external blog "Caselines") at http://caselines.blogspot.com, which is written more for an audience of knowledge management practitioners and the like.)

Practice Area

Practice area blogs include Patent Practice Updates (for those filing patents with the US Patent & Trademark Office and comparable activities) and the Real Estate Finance News Blog (each has more than 100 posts). The Private Equity Group creatively uses their blog (which is not even called a blog) to house information about its monthly "All Hands" meeting information, listing who presented, providing links to PowerPoints, and even linking to video in most instances.

A topic-specific internal blog "Financial Crisis Recovery" recently made the jump from a purely internal resource (with more than 150 posts) into the first firm-branded external blog: http://www.financialcrisisrecovery.com. The internal Financial Crisis Recovery blog will continue with content not appropriate for use outside the firm.

Smaller Groups

The group of litigation and business attorneys who work on trademark, copyright and trade secret matters also blogs. From an organizational perspective, this small group is very diverse with attorneys in several offices and from two departments. Each of the attorneys is an author on the blog. Their use of the blog has largely replaced emails that they would typically have sent each other on substantive topics.

Lessons Learned

Goodwin Procter has added a few business processes around SharePoint's Enterprise 2.0 tools to remedy some of their deficiencies. We make a friendly "subscription" button available on the home page of each wiki. We replace the "How To" pages that come with the wikis with centralized custom pages that specify firm-technology-specific "how-tos," such as linking documents from our document management system. We keep a centralized "wiki roll" to track progress on the wikis, so that we eventually can prune or lay to rest obsolete content, and to help us track wiki progress.

Blogs require some up-front attention to the categories and also require a friendly "subscribe" button.

With all of these social applications, we've required that a search box specifically for that site be available on the "home" or base page. The firm-wide SharePoint search already indexes the content fairly well.

Options for further adoption of Enterprise 2.0 include a wiki and/or blog product with richer social features (such as better alerts), Enterprise RSS, social networking inside the firewall, and social tagging.

Conclusion

In the relatively short time that wikis and blogs have been in place at Goodwin Procter, they have been adopted across the Firm's administrative departments, practice areas, and in matter teams.

More knowledge has been captured and stored because communications have been opened up to more authors and have been moved out of the email "silo" and into public spaces. More knowledge transfer has occurred because the Enterprise 2.0 tools are built to communicate, whether through alerts of new information, easy browseability through user-created structure, or through better search.

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KNOWLEDGE MANAGEMENT PROFESSIONALS IN THE CANADIAN PUBLIC SERVICE

By Hope Seidman, Andrea Mamers and Bev Mitelman © 2009

Abstract: With an expected 30-40% of the Canadian Government's key knowledge workers retiring in the next five years, the Canada School of Public Service (the Government's public service learning and leadership development department) has created a specialized team to support the creation of communities of practice as vehicles that leverage technology to provide collaborative approaches to learning and professional development. Acting as a consulting practice, the *Centre of Expertise in Communities of Practice in the Federal Public Service* provides a wide range of services and tools that enable sustainable communities of practice development. Committed to implementing KM practices by incorporating them into daily work activities, the Centre's work has resulted in the creation of more than 55 virtual communities of practice for public servants across Canada.

Key Words: Communities of practice, learning technologies, collaboration, social media

Introduction

Many organizations are jumping on the Web 2.0 bandwagon and incorporating new collaborative tools in the workplace. The problem is that often there is an imbalance, with a primary focus on the technology. Knowledge management practitioners, however, are aware of the fact that *people* are at the heart of the workplace and not the technology.

At the Canada School of Public Service (Canada School), efforts are underway to create more of a balance – to leverage the strategic advantage afforded by technology, while ensuring that people are at the centre of any collaboration. A key part of this strategy was creating the *Centre of Expertise in Communities of Practice in the Federal Public Service* – a group of knowledge management professionals who offer advisory services to fellow public servants in order to successfully integrate Communities of Practice (CoPs) and other collaborative learning approaches into their work.

As public servants, the Canada School is versed in the art and craft of public service and is well positioned to support colleagues in meeting their learning and professional development needs.

KM in Canada's Public Service

With the average age of Canada's public servants inching toward 50, knowledge management (KM) is becoming increasingly important to the Canadian Public Service. It is expected that between 30-40% of the government's key knowledge workers will retire in the next five years. Consequently, the government is challenged with attracting and retaining new employees and ensuring that 260,000 public servants have the necessary skills and knowledge to both do their jobs well and to operate in a bilingual French and English work environment.

The Canada School is the federal government department that is dedicated to serving the learning and leadership needs of public servants and their organizations across Canada. Headquartered in Ottawa, and with regional offices throughout the country, the Canada School directly supports identified learning needs associated with a high-performing, dynamic and professional Public Service.

Centre of Expertise in Communities of Practice

"Communities of practice are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly."
(Wenger, 1998, p. 11)

In a previous edition of the KM Pro Journal, Hubert Saint-Onge (2008) highlighted the benefits to organizations of implementing communities of practice (CoPs) for managing knowledge and promoting collaboration.

Recognizing the value of managing tacit knowledge and some of the limitations associated with more traditional, formal training, the Canada School initiated a *Centre of Expertise in Communities of Practice* (the *Centre*) in 2004.

Based in Montreal, Quebec, the Canada School's *Centre* exhibits daily the philosophy it promotes by relying on the use of tools and technologies to collaborate and communicate with colleagues and clients nationwide. The team is dedicated to offering its expertise in the design and implementation of CoPs as well as various collaborative approaches to learning and professional development.

Since its inception, the *Centre* has supported the development of more than 55 virtual CoPs for public servants across Canada using social media technologies. Each community is developed with specific goals and meets various strategic outcomes.

In general, however, these virtual communities are aimed at meeting the following learning and knowledge management needs:

- Create a life-long, continuous learning environment
- Support long-term succession planning
- Foster the reuse of materials and reduce the need to "re-invent the wheel"
- Facilitate learners finding information and locating expertise quickly and easily
- Reduce information overload by helping to order information
- Efficiently reach and train the volume of new employees distributed across the country
- Provide an alternative learning option that could reduce the costs associated with developing, delivering and maintaining formal training
- Improve the transfer from formal training to workplace practices
- Provide the right people, with the right skills, at the right time in order to meet our changing needs.

CoPs in the Public Service differ from "work groups" or "project teams" in that CoPs are oriented toward knowledge sharing or collective problem solving around a common area of practice. Typically, they are not product-oriented nor do they have specific deadlines. The structured process of establishing virtual communities takes into account the context and purpose of its members in order to help ensure success (Saint-Onge & Wallace, 2003).

Communities, however, constantly evolve and react to changing environments to support members' shifting contexts, needs and work-related activities. CoPs focus on stimulating interactions among colleagues, creating and transferring knowledge, and most importantly storing knowledge for future use.

CoP Consulting Services

The Canada School's *Centre of Expertise in Communities of Practice* is made up of highly qualified and specialized experts with a variety of skills, backgrounds and specialities. Specifically, its expertise lies in the design and development of virtual communities of practice, knowledge management, pedagogy, cognitive science, project management, client services, online facilitation, evaluations and applied research. Building on its diverse talents and skills, the team fosters a creativity which enables it to achieve success in a range of different types of projects.

This Canada School team acts as an internal consulting group to walk groups of federal public servants through the CoP development process. Some of the Centre's products and services include:

Community of practice process model:

The model includes advice on how to establish, grow and expand a community of practice (Saint-Onge & Wallace, 2003). The *Centre* has adapted this model in order to be flexible and meet Public Service work context.

Collaboration tools:

The *Centre* offers advisory services on tools such as: Wikis, virtual CoPs and virtual classrooms.

Professional support for CoP facilitators:

Distance (or online) technical refreshers are available. Refreshers include tips and best practices on how to motivate participation and contribution.

Presentations:

The *Centre* offers presentations on subjects such as Web 2.0, Informal Learning and Communities of Practice.

Customized workshops and presentations:

Typically, these workshops are focused on the use of collaborative tools and approaches.

Project Management:

The *Centre's* advisors assist in planning, organizing, and managing resources to bring about the successful completion of specific project goals and objectives related to CoP implementation.

The Centre's View of KM

In a recent discussion, the Centre's team reflected on an important question: What makes the Canada School's *Centre* a team of KM professionals? It was agreed that the team's culture is one of sharing and support, where a common vision and passion for knowledge exchange and collaboration is valued. Most importantly, the Canada School sees the value in sharing knowledge and information with others.

Other team members described KM as a mindset. As professionals in the domain of learning, there is a need to constantly be open to new learning challenges, feedback and ideas of others. The team genuinely believes that the collection of many perspectives is always better than one. Because the team is aware of the value of knowledge and works in a learning organization, it is willing to share and actively encourage others to do the same.

In addition to attitude, a KM professional requires the ability to see the "big picture" and to see what constitutes that big picture. The capacity to set a goal for an organization or a group and to establish the steps required to meet that goal are essential.

One of the team members, Barbara Komorowski, clearly summarized the team's views in the following statement:

> KM is more than filing, making lists, storing and retrieving knowledge. It is openness to ask questions, to make links and re-share those links with others. KM is about giving and sharing and it is quite akin to the CoP concept. Simply put, making our tacit knowledge explicit is the root of KM. Theory leads us to make decisions but practice makes it come alive. Experience teaches us what works and what doesn't and sharing and learning from those experiences makes one a KM professional.

Shared Vision

This Canada School team is deeply committed to implementing KM practices by incorporating them into daily work activities and helping other government organizations leverage these approaches. The vision of the future is to help implement government-wide platforms that every public servant can access.

The ultimate goal is to bridge the time and space gap for public servants, bring people together, network, collaborate, share best practices and reuse knowledge within government departments and interdepartmentally. The Canada School is committed to facilitating knowledge management efforts so public servants are better equipped to meet emerging priorities and future needs of government and the citizens they serve.

Lessons Learned

The lessons learned thus far are similar to challenges that many organizations face when implementing new approaches and technologies:

Seek balance between structure and flexibility

The literature outlines a systematic and structured approach to designing and developing CoPs. While following the process model helps to ensure the successful implementation of communities, we often encounter situations that require flexibility in order to meet operational requirements or other constraints such as time, budget and human resources. For example, if communities move too quickly through the process or in an unstructured manner (e.g., failing to clearly define important elements such as community objectives and content), the success of the community is often compromised. In particular, member participation is lower than anticipated. In these instances, the Centre walked the client through the initial stages of community design to fill in the gaps.

While advising many communities over time, it has become abundantly clear that some flexibility in the development process is required. However, when phases are omitted or carried out prematurely, it can have a negative impact on community development.

Be patient

Communities take time to develop. Virtual CoPs require a change in the way people work. We are asking people to openly share, collaborate and participate. Members must be convinced that working collaboratively will add value to their work. Trust between members also takes time to build. A good change management strategy will help, but keep in mind that it will not happen overnight.

Support

In addition to the initial advisory services, the Centre offers comprehensive support to help sustain communities such as: online training capsules, technical support, refresher courses (technical and various topics related to community development), facilitator training and community evaluations. We believe that ongoing support is critical to the success of CoPs.

Next Steps

The Canada School believes it is well positioned to offer a solution to the growing demand for informal social learning in the Canadian Public Service. Specifically, the Canada School is working towards:

a) The implementation of a government-wide CoP platform whereby every public servant has access to a set of common collaborative tools;

b) Cross-pollination of more than 55 closed communities already existing today into a linked and open forum where knowledge transfer across functional groups and strategic communities will take place; and

c) Conducting action and evaluation research to continuously improve upon the quality of our work and to contribute to the scholar-practitioner community.

Overall, the vision is to integrate virtual communities into the Canada School's standard products and services (e.g., traditional classroom courses) in order to build upon and add value to what is currently being offered. In the workplace context, the implementation and evaluation of informal learning strategies and social learning technologies to support them are relatively new. We are excited to be at the forefront of innovation and to support the learning needs of today's and tomorrow's Public Service.

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KNOWLEDGE RETENTION STRATEGIES FOR THE GOVERNMENT SECTOR

By Michael J. Novak © 2009

We have known for some time of the inevitable departure of the baby boomer generation from the workplace. Articles, books – indeed, entire conferences – have addressed the topic, and many of these have addressed it in the context of public sector organizations. But is the government sector really prepared for what former Office of Personnel Management Director Linda Springer calls a "retirement tsunami?" Are government entities – federal, state, local, tribal – ready to meet current and emerging challenges without the collective knowledge of the baby boomer generation?

How does government address the issue of knowledge loss in organizations? Or, stated in the reverse, how does government retain this knowledge? Some have ignored the problem and hope it will go away. Others refuse to acknowledge the existence of a "problem." Still others have decided to cross that bridge when they come to it – when the baby boomers have left … and taken their knowledge with them.

At this year's Knowledge Retention Strategies for the Government Sector conference attendees discussed practical strategies and initiatives being employed within the public sector in dealing with knowledge retention.

Michael Novak, of the Internal Revenue Service, and Chair of this year's conference, set the stage: One of the greatest difficulties facing organizations today is the aging workforce. But while much attention has been given to the loss of knowledge of the retiring baby boomer generation, little attention has been paid to the future, more insidious, brain drain. A number of other knowledge draining factors are at play in the workplace and leaders must be prepared to address these phenomena. Novak's presentation reviewed the history, causes, and likely outcomes of the projected brain drain; illustrated how the loss of the baby boomer generation is only the tip of the knowledge loss iceberg; and described a systematic approach for capturing, retaining, and transferring knowledge.

Susan Camarena Wallace, Chief Knowledge Management Officer for the Federal Transit Administration, addressed the issue of designing a knowledge retention program to fit the unique needs of a specific organization. Dr. Wallace specifically addressed how best to: introduce a knowledge capture program into an organization; identify methods that catch on; create interest and participation in the program; blend mentoring and networking in the program; and posture for a successful follow-up phase to the program.

Don Drach and Carol Willett, of the Government Accountability Office, talked about "Personal Succession Planning as a Knowledge Transfer Strategy," and explored strategies for creating a smooth entry to and exit from a job. Drach and Willett posed the critical "who, what, when, why and how" questions that can help organize the information, knowledge, and relationships essential to an individual's success and that of his/her successor.

Dave Lengyel, of NASA Headquarters, illustrated an approach adopted by NASA that enables them to not only to learn lessons from past programs such as Apollo, Space Shuttle, and the International Space Station, but also to generate and share new engineering design, operations, and management best practices through existing risk management procedures. Lengyel showed how this framework highlights potential risk and "knowledge gaps" that might be mitigated through one or more KM practices or artifacts.

The highlight of the conference was a panel discussion, "Making Knowledge Retention Part of the Business Process," consisting of Marion Georgieff, Chief Knowledge Officer, U.S. Secret Service; Doug Brook, of the U.S. Air Force Materiel Command Knowledge Management Center of Excellence; Terrie J. Rollins, CEO, RMR Technology Group; and Giora Hadar, Knowledge Architect, Federal Aviation Administration. The panel discussed how, if organizations are to be successful in executing their missions, they must build and integrate knowledge-sharing and retention techniques into their processes and strategies. The panel members tapped their experiences to discuss how understanding existing culture, processes, technology, and content enables the building of solutions that integrate KM into our daily workflow, making it a part of an individual's toolset.

Lt. Col. J.D. Whitlock, Chief, Decision Support Branch, Air Force Medical Service, discussed how knowledge management initiatives succeed based on the ability of groups of people with similar jobs to "gel," to establish a true community, and to share knowledge that ultimately helps both community members and the organization as a whole. Lt. Col Whitlock described how the Air Force Medical Service established a KM-focused intranet, enabling hundreds of communities of practice to build "knowledge junctions" where members across the globe are able to connect with experts in their field, establish long term trusting relationships with others, exchange best (and worst) practices, and ultimately improve organizational performance.

The final session of the conference covered a recent knowledge retention survey of 69 (mostly public sector) organizations conducted at Johns Hopkins University. Very few of the organizations surveyed possess a formal knowledge retention strategy, which reflects other recent surveys on succession planning that indicate only 60% of companies have a succession plan or engage in succession planning. Dr. Jay Liebowitz discussed these and other findings and inferences drawn from the survey and from his new book, *Knowledge Retention: Strategies and Solutions*.

About the Author

Michael J. Novak is a Senior Business Operations Specialist with the Internal Revenue Service Office of Procurement in Washington, DC. During his extensive government career he has developed and implemented Defense procurement policy, helped write the Treasury strategic plan, served as an Examiner for the Malcolm Baldrige National Quality Award, and participated on task groups sponsored by Vice President Gore's National Partnership for Reinventing Government. He is a past Co-Chair of the Federal Knowledge Management Working Group, and is President of the Washington, DC, Chapter of KMPro.

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November 17-19, San Jose CA
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With the economic earthquake around the globe, our enterprises have to be smarter, creative and innovative. Richard Florida, author of *The Rise of the Creative Class*, says that the only way for us to survive the world economic reset in a knowledge age is to capitalize on our human capital, put our creativity to work, stoke our innovative furnace. There are many ways to fuel the creative fires—from management techniques, to team-building, and effectively leveraging existing and emerging technological investments. KM World 2009 is where the latest strategies and solutions will be explored.

At KMWorld 2009, experienced knowledge, content, search, and intranet experts not only provide practical, hands-on information, case studies, and instruction that allow attendees to maximize the value of technological investments but also share creative ideas for making the most of knowledge, intellect, talent and human capital in open diverse, transparent organizations. For the first time, attendees will participate in a half day learning experience using some radical innovation techniques.

KMWorld 2009 includes presentations that demonstrate best practices in making the most of knowledge assets, maximizing human capital, and best practices in technology implementation and management. KMWorld 2009 key themes: knowledge, records, & content management, creative enterprise 2.0 practices, innovation strategies, compliance & ediscovery, intranet strategies & solutions, social networking & collaboration, taxonomy & classification, human capital & knowledge assets, knowledge sharing processes & systems, information architecture, organization structures & process improvement.

KMWorld 2009 provides attendees with all the essential pieces of the information engine that powers today's effective enterprise—including knowledge creation, publishing, sharing, finding, mining, reuse and more. Well implemented and managed, these work together to enable business problem-solving, innovation, and

Retooling the Enterprise

- Workflow
- Social Networking
- Records Management
- Portals
- Knowledge Management
- Intellectual Property
- Image, Forms, Capture
- Enterprise Search
- Enterprise Applications
- E-mail Management
- E-discovery
- Document Management
- Digital Asset Management
- Customer Relationship Management
- Content Management
- Collaboration
- Business Process Management
- Business Intelligence

achievement. For interesting conversations and discussions of these topics prior to the event, check out the new KMWorldblog, www.kmworldblog.com, which features KM thought leaders such as Dave Pollard on resetting the enterprise and "what's after KM?", Bill Ives on making enterprise 2.0 work and KM and Twitter, and lots more.

Conversations, Connections & Decision Making

What's new about the new economy is that work is conversation. Alan Webber, Co-Founder, Fast Company

Social computing takes on the form of an older oral tradition… *it always has been, we just forgot about it for a while.* Dave Snowden, Chief Technology Officer, Cognitive Edge

Web 2.0 technologies, due to the participatory nature both on the contribution and the consumption sides, can dramatically improve the effectiveness of knowledge management. Sukumar Rajagopal, CKO, Cognizant

[*Knowledge is*] *the systematic use of quantitative and statistical techniques to analyze data and make fact-based decisions--it's just another form of knowledge that needs to be managed.* Tom Davenport, author, consultant, and professor

*Where are you in the knowledge value chain, and how well are you connected to the other pieces?*Art Murray, CEO, Applied Knowledge Science & Co-Director, Enterprise of the Future Program, George Washington University

About the Author

Jane Dysart is a Principal of Dysart & Jones Associates, an internationally recognized leader in knowledge and information service consulting that focuses on assisting organizations in the areas of information management, strategic and business planning, service design, organizational structuring and market positioning, conference planning, information audit, customized workshops, facilitation, team and management coaching. Founded in 1992, Dysart & Jones has developed a strong track record of working with information service providers in public and private sectors to develop plans, products and services that are as visionary as they are tactical and responsive in a rapidly changing environment. Prior to founding Dysart & Jones, Jane was Manager, Information Resources for Royal Bank of Canada. She is currently Conference Program Director for KMWorld & Intranets 2009.

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Attending a Conference?

The KMPro Journal invites you to submit information about conferences you've attended. We're interested in conferences focused on the field of KM as well as examples of KM topics covered in conferences NOT dedicated to KM. What trends did you see across the conference presentations and discussions? What new ideas or immerging trends were offered? Share your insights.

Submit your conference learning to: editor@kmpro.org.