KM in Caritas Nigeria
Our Journey so far

First Conference on Knowledge Management for Change,
Lome, Togo (June 13 – 15, 2023)

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Introduction

Goal of Presentation:

- A peep into the KM effort in Carita Nigeria
- Share our pains, gains and opportunities in the journey
- Share lessons and experiences
- Look at the prospects ahead

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About Caritas Nigeria

- The official Agency of the CBCN for implementing/coordinating development interventions in Nigeria
- Founded 2010 and a member of Caritas family 10+ yrs
- Operates on six thematic Areas of Human Development
  - [Good Governance; Health/HIV; Humanitarian Response; Agriculture/Livelihoods; AntiHuman Trafficking; ICS]
  - [Education; Environment; Gender]
- Strong partnership base with the church structure: National Office working with 56 dioceses and serving over 200 million people
- A huge task
- Rapid growth to current staff strength over 500 persons with multiple interventions across the country

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Initial Situation

- Joined organization in 2014 from the private sector
- First exposure to development sector – challenges; coping
  - Multiple projects and teams
  - Activities: Meetings; reports; documentation
  - Different people in numerous specialties or domains working together for a common purpose
  - Highly dynamic development sector; Staff attrition

Observations:
- Weak mechanisms for harnessing knowledge from the enormous work we were doing
  - Meetings
  - creation and archival
  - accessibility
- Reinventing-the-wheel syndrome
- Little room to mentor new staff
- Burnouts – inefficiencies; poor outcomes

Insights:
- Huge opportunities for KM
- **Inspirations**

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Idea of KM

Proposal

- 2014: "Building Organizational Intelligence in CCFN: A knowledge Management Approach"
  - Mini KM audit;
  - Articulated all the issues and how KM could address them or add value to the organizations business objectives
  - Proposed ideas for a formal implementation

Coincidence

- Acquisition of Microsoft SharePoint platform – envisioned to:
  - bring about automaton of business processes
  - Improve internal communication
  - Streamline document management

Pitfalls/Failures

KM

- New concept yet to be understood
- Not well-received
- Disruptions/Change Management
- Adopting the right approach
- Excuses: budgeting and inclusion in donor-funded programs
- **Fate**: KIV (Keep in View)

SharePoint

- Did not bring desired results of automation - No provision were made for technical setup and support from vendor or an expert
- Yet to be perfected by Microsoft
- Stiff Learning curve required in using it
- **Result**: Disappointments

Positive developments (2016 – 2019)

KM

- Advocacy at the highest level continued
- KM unit created but poorly ill-defined and poorly equipped to function
- Synergies with Communications unit
  - Official website upgraded
  - Communications Boost: trainings; equipment, hands
  - Involvement of staff in sharing of posts through social media handles
- Templates for Reports/story-telling
- Development of SOPs for the different departments
- Development of Taxonomy System - Controlled vocabularies

Result:
- Creation of structured content
- Blogging of success stories and beneficiary statements
- Internal and external visibility
- Experts List
- Inter team collaboration

Infrastructure/Capacity

- SharePoint subscription renewed despite poor utilization
- Continuous feedback to Microsoft with concomitant improvement of the product
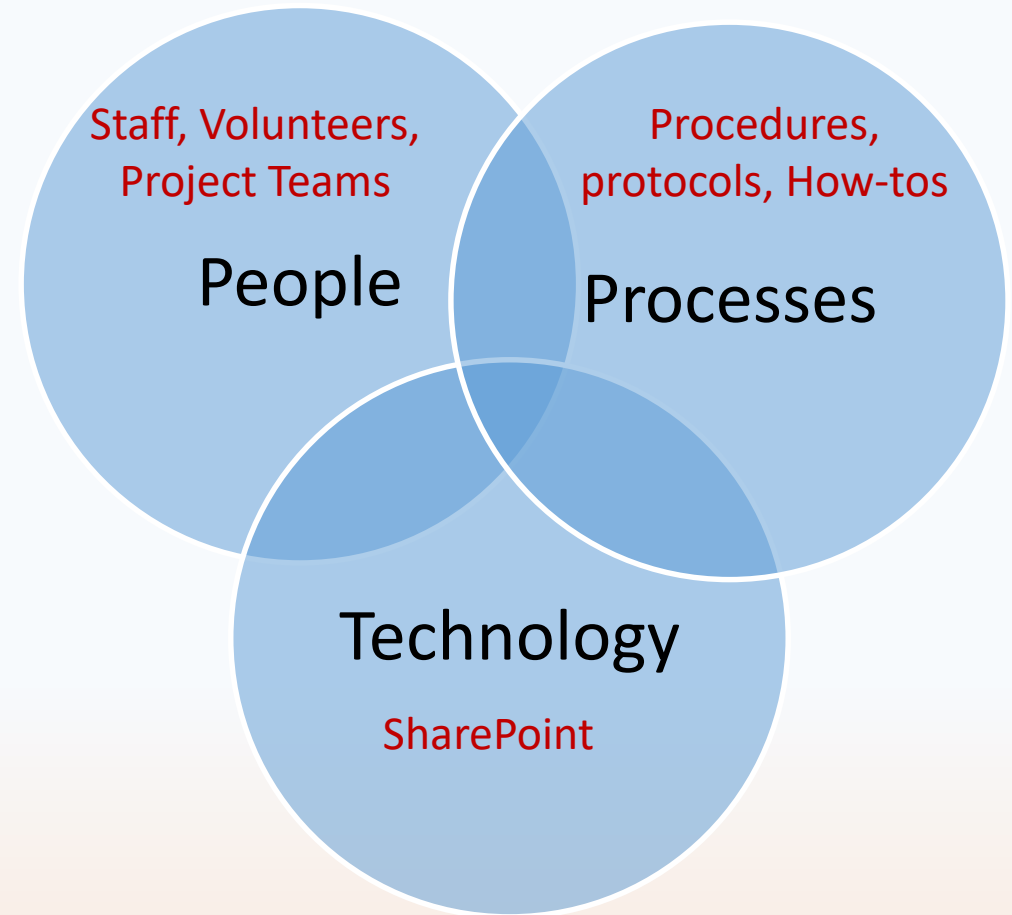- Inclusion of **Teams** among the bundle

Result:
- The Hope was kept alive

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Challenges for KM

- Maximizing what was available to drive a KM Agenda with particular attention to People, Processes and Technology in the organization
- Improving internal mechanisms for knowledge Creation, Storage, Sharing and Utilization with a view to adding value to our work
- Cost reduction
  - Using low-hanging fruits
- Choice of the best approach that suits our context
  - What KM areas to focus on

Staff, Volunteers, Project Teams

People

Procedures, protocols, How-tos

Processes

Technology

SharePoint

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Where to Focus?

From the box

1. Brainstorming
2. Learning and Idea Capture
3. Peer Assist
4. Learning Reviews
5. Action Reviews
6. Knowledge Café
7. **Communities of Practice**
8. **Taxonomy**
9. **Story-telling**
10. Document Management System (SharePoint)
11. Knowledge Bases (Wikis, etc. already in SharePOint)
12. **Blogs (Website, SharePoint)**
13. **Social Networks**
14. Directories/Databases
15. Search Tools

Done

1. **Taxonomy**
2. **Story-telling: Success stories (Website, Social Media)**
3. **Action Reviews**
4. **Communities of Practice (List of experts)**
5. **Social Networks**
6. **SharePoint**

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The Turning Point - 2022

New Grant (Extension of closed project)

Need to avoid issues witnessed in the old project

Inclusion of KM in the new project

Challenge for innovations to improve program performance

Massive improvement by Microsoft (Microsoft 365)

About ACCESS Project

- 5 – year PEPFAR-funded HIV care and treatment intervention program implemented in 3 states

- An extension of a previous grant (4GATES Project)

- Project Team scattered in different project sites with leadership from HQ

- Highly technical Health project that thrives on effective implementation strategies, knowledge, timeliness, collaboration and teamwork

- High Competition with other Ips

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Issues

- Poor documentation
  - Poor mechanisms for capturing and creating knowledge
- Poor access to previous project resources
  - All buried in email attachments
  - Poor email etiquette
- Abuses of SharePoint Platform
  - Lack of capacity or understanding
- Huge staff attrition with tolls on organization
- Conservativeness in the Health domain
- COVID experience

KM Response

Proposing a solution

What we did

Looking Inwards

Existing Technological Infrastructure

Cost considerations

Taxonomy System

Microsoft 365 Ecosystem

- Existing Infrastructure – zero cost
- Cutting-edge improvements within 3 years
- Over 50 apps, and counting ...
- Tonnes of KM-ready functionalities and tools

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Solution

Leveraging the improved Microsoft Ecosystem (Microsoft 365) to drive KM in the ACCESS Project (Pilot)

How?

Knowledge

- **Creation**
- **Storage**
- **Sharing**
- **Utilization**

Knowledge Creation

- **Knowledge Hub and Virtual Workstation for Project Team**
- All activities: Meetings; presentations
- Knowledge-creation from:
  - chats; collaborations, feedback
  - KM Nuggets from programme strategies and outcomes
  - Project procedures, SOPs and protocols for easy publication
- In-built productivity tools (Office suite) for content-creation
- KM Tools (Custom Wikis, Glossaries, list, knowledgebases etc used to publish knowledge outputs)
- Accountability and roles for everyone
- Seamless connections – apps, connectors

Microsoft Teams

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Teams Structure

- Teams by default are tied to the respective SharePoint sites, OneDrive root folder and a Groups while channels form subdirectories

- Channels reflecting the different and program areas with respective leads (Treatment, Pharmacy, Adherence etc)

- Each channel is provided with relevant knowledge resources drawn from apps in the ecosystem

- The KM focal person roves across all subgroups to harvest relevant knowledge outputs and and channel them to various team needs as necessary

- Team leaders are members of respective Communities of Practice on Yammer

- Designated CoPs are available to serve any call or knowledge need at anytime

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Microsoft Teams

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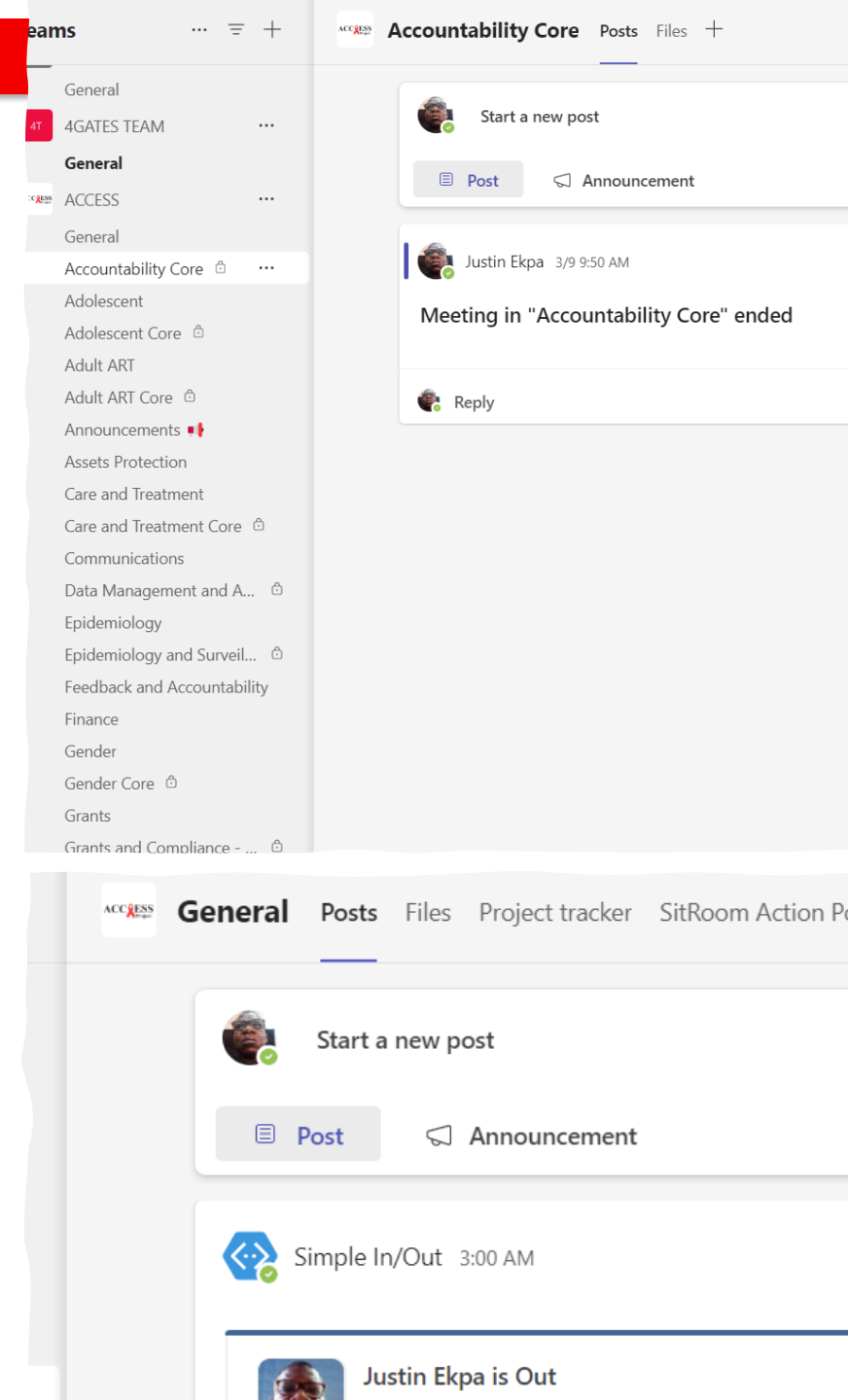
Knowledge Storage

OneDrive

- Team's Root folder forms Repository for all our documents in the project
- Implementation of existing taxonomy System with key components for:
  - ***Directory Structure***
  - ***File naming convention***
  - ***Metadata***
- **Metadata tailored around controlled vocabulary and keywords in the ACCESS project**
- **Functional Libraries + Search engine**

Outcome

- **minimized sharing of documents via email attachments**
- **Better collaboration on single documents**
- **All processed documents can be easily accessed across other platforms in the Ecosystem (SharePoint, Teams, Groups)**
- **No excuses for knowledge in the team**

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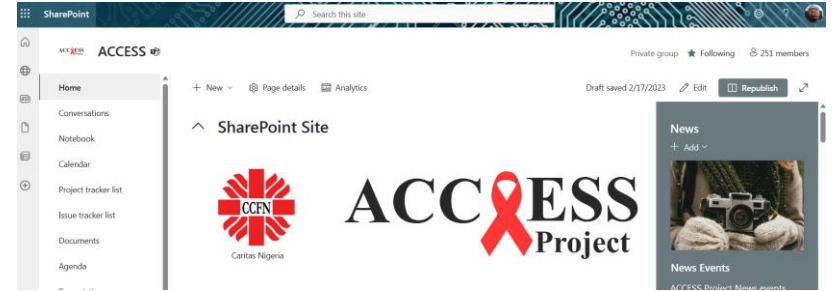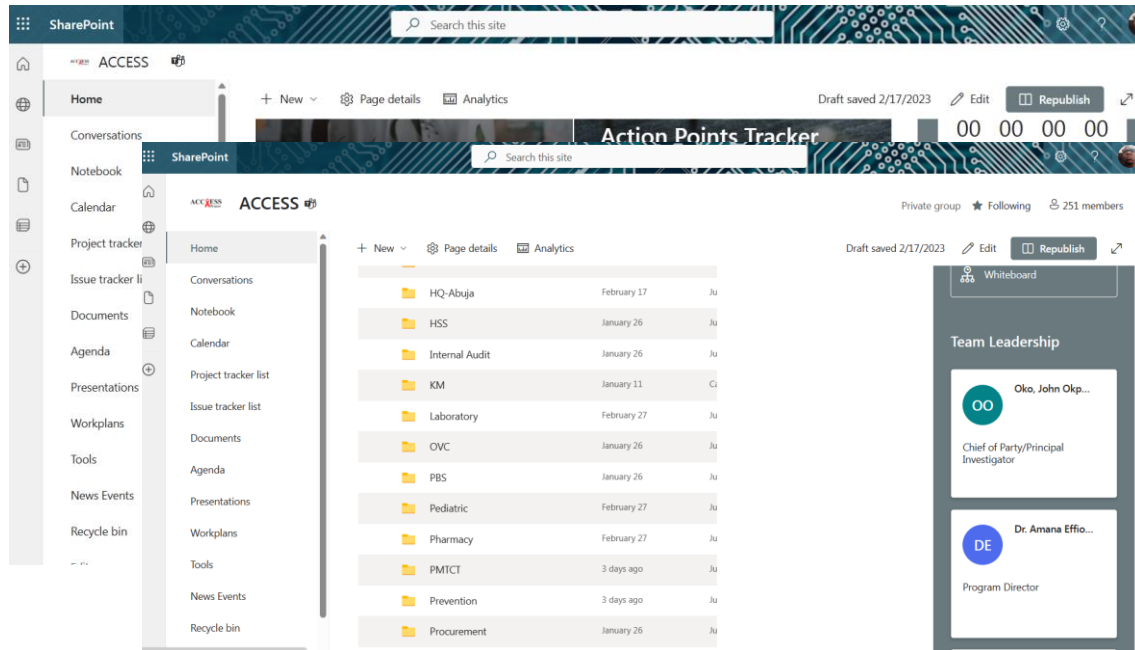
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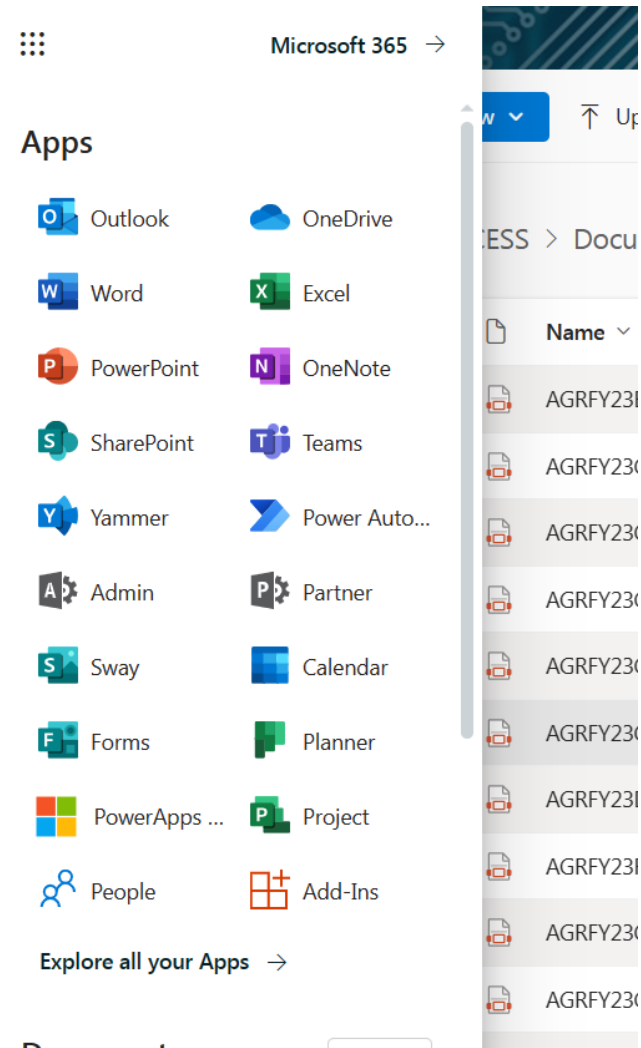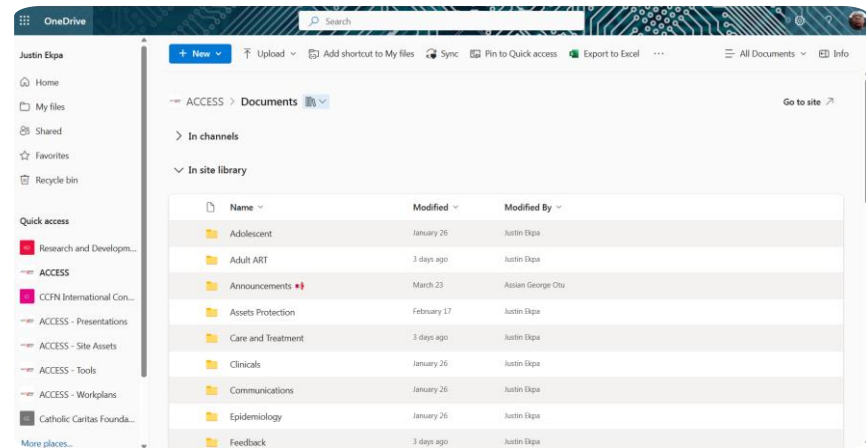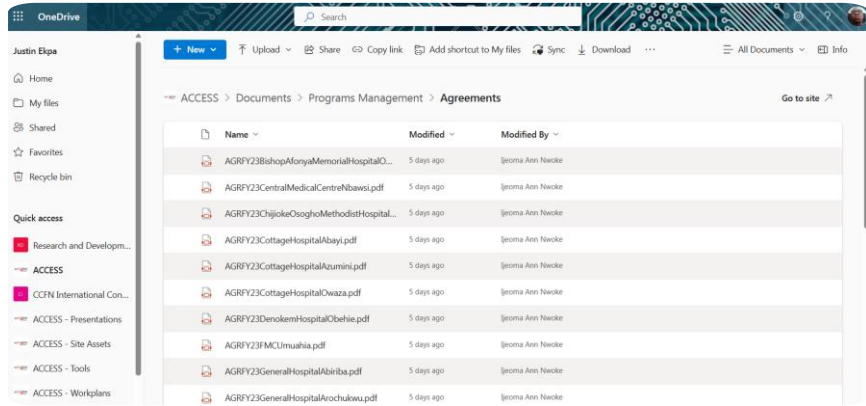
Knowledge Sharing

- Anchored from the Project Team's SharePoint Site
- All project outputs or activities from the other parts of the ecosystem are shared through here
- Alll Resources are automated in a seamless manner and emanate from other parts of the ecosystem
- Newsletters and summaries from project interventions easily published
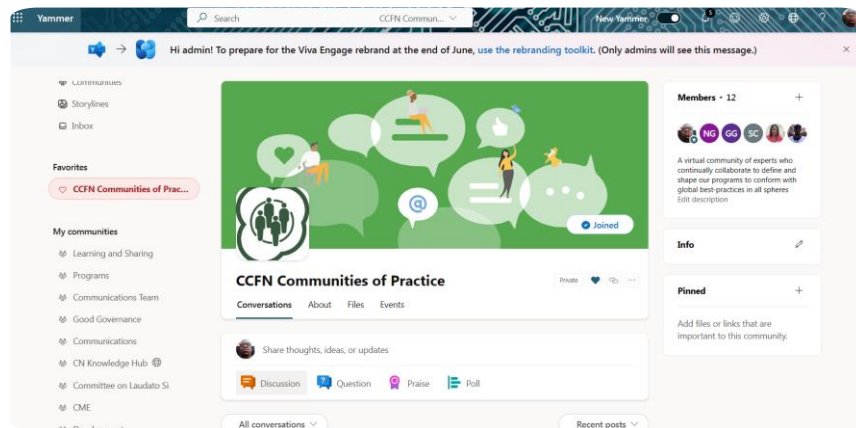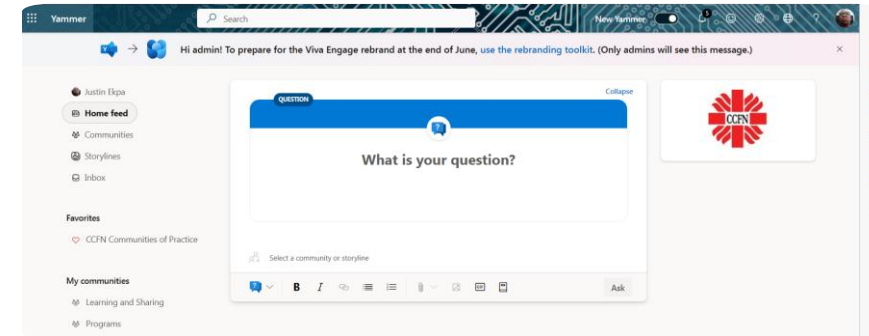- Every activity leaves footprint on individual or group emails giving rise to better communication

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SharePoint

Knowledge Utilization

- Entire Ecosystem:

  – Teams; SharePoint; Yammer; Delve

- Communities of Practice

Communities of Practice with Yammer

Overall Outcomes

- Project teams can work more smartly

- Better collaboration and efficiency in a work-friendly and business- oriented virtual space

- Project resources easily accessed because of implemented taxonomy system

- There is easy access to any knowledge resource at any time

- Peer Assist through facilitated by the internal CoP

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Challenges

- Still a pilot within a project: to be scaled up gradually
- Consertiveness in the Health sector
- Evolving: No policy or strategic plan; still at project level; other project still working in silos
- A formal guide (Strategic framework) from the parent body will go a long way to align and prioritize efforts locally and get the best outcomes
- Staff capacity gaps
- Cost: though Microsoft program for NGOs makes it affordable for non-profits, numerous addon licenses may be needed if additional cutting-edge benefits from third party vendors are deployed
- More work needed in setting up the different work spaces and creating knowledge bases
- Struggle with change management
- Fast pace of improvements and changes by Microsoft
- Extending support to lower cadre partners within the church system: dioceses, JDPC etc

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Prospects/Plans

- Current pilot associated with new experiences and the development of statutory guidelines and frameworks to guide scale up within and outside the organization

- Scale up to other units, departments and program areas anticipated (eg Agriculture, Anti-Human trafficking, Good governance)

- Organization-wide framework for scale up with joint efforts and collaboration with the Research and Development Unit and the Institutional Capacity Strengthening Program of Caritas Nigeria

- Ultimate goal is to cascade KM down to lower tiers of church partners (dioceses, JDPCs) to effect desired change and capacity at the grassroots

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Success story

- Award of a 2.5 million USD grant from a donor for whom Caritas Nigeria had no previous relationship with and never submitted any grant to or responded to a call for proposals.
- Unprecedented grant in the history of Humanitarian and Agriculture thematic Area interventions
- Conrad-Hilton Foundation, USA
- Grant came from visibility created from KM-driven activities: blogging; story-telling and summaries of agricultural best practices on the website boosted further by social network boost
- Over 10 years Initiative in the North-east part of the country replicated and piloted in the Southern part of the country with amazing results
- Caritas now extending Climate-smart agricultural initiatives to more communities in Nigeria
- Support and goodwill to KM has been boosted tremendously since then

Building Sustainable Livelihoods for Vibrant Communities (B-SLiC) Program

Goal
To contribute to improved access to sustainable livelihoods in vulnerable communities of Southwest Nigeria

Strategic Objectives
- Increase Food Security and Incomes of 4000 households
- Promote Environmental Stewardship of 2000 Households

Target Persons
20,000 vulnerable persons (women, men, youths, children) across Ekiti and Lagos States, Nigeria

Programme Design & Impact
- Nutrition sensitive agriculture and viable life skills for increased incomes and healthier communities
- Strong focus on capacity building to reduce the vulnerabilities and increase self-employability
- Increased access to markets, financial inclusion and job creation in target communities
- Emphasis on Climate-Smart Agriculture for sustainable productivity and environmental protection

Implementing Partners/Project Locations
- Sisters of St. Michael the Archangel (SSMA), Ekiti Sate
- Sisters of St. Louis (SSL), Ekiti State
- Daughters of Charity of St. Vincent De Paul (DC), Lagos State
- Sisters of the Eucharistic Heart of Jesus (EHJ), Lagos State.

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B-SLiC Project (Building Sustainable Livelihoods in vibrant Communities)

Conclusion

- Knowledge Management has huge potentials to thrive and bring a turn around in Caritas Nigeria
- The journey has come with several pitfalls, gains and opportunities.
- Valuable lessons have been learned along the way informing and charting a new and sustainable approach which will over time bring about desired change or transformation in our development work
- This has been our experience

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Thank your listening

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