

October 5, 2018

**MEMORANDUM FROM THE OFFICE OF THE UNDERSECRETARY FOR
PROTECTIVE OPERATIONS AND PROGRAMS GROUP**

FOR : ALL OFFICIALS AND EMPLOYEES
DSWD Central and Field Offices

SUBJECT: Knowledge Product Development Process Guide

I. Rationale

The Department of Social Welfare and Development (DSWD) has been the Philippines' primary provider of Social Welfare and Development (SWD) programs throughout the years. Because of this, its rich experience and the lessons learned from these have become a treasury of how things should and could be done.

The importance of capturing the lessons learned from its years of experience and the value these may bring to other SWD service providers reinforces the Department's obligation to change the situation of this country on a larger scale. But this can't be done alone. Now more than ever, there is need to collaborate with stakeholders and partners. To do this, one of the mechanisms identified for collaboration is effective knowledge management with knowledge sharing as one of its primary components.

Among the different ways to share knowledge between and among internal and external stakeholders of DSWD, face-to-face interaction is mostly used. However, this activity requires more resources than what may be benefitted from it. A more practical and efficient way to share knowledge would be through Knowledge Products (KPs). KPs may be packaged as videos, documents, audio recordings, etc. In DSWD's 67 years of service, it has produced thousands of similar outputs for the use of both internal and external parties. However, upon close inspection, many of these are limited to relaying information.

This guide differentiates KPs from Information, Education and Communication (IEC) materials and explains the difference between the processes involved in developing the former and how specific outputs may be developed so the former could capacitate users to act. This way, the quality of the outputs made by each office is upheld in such a way that internal and external stakeholders see its value and relevance in the work they do. These are crucial to the establishment of the Department's mechanism for further learning where our internal and external intermediaries and partners are enabled in delivering timely and relevant services to the People.

II. Legal Bases

Administrative Order No. 17, S. 2011 Knowledge Management (KM) Framework of the Department of Social Welfare and Development (DSWD) – provides directions on how to implement KM in the Department.

Administrative Order No. 02, S. 2017 Vision, Mission Statements and Organizational Outcomes – provides guidance on the directions and ideals of the Department.

III. Coverage

This guide covers all knowledge products (KPs) produced, developed, authored, and/or sponsored, by the Department as defined hereto, regardless of the media used to present it.

IV. Objectives

The objectives of this guide are given below:

1. Provide a standardized process that will guide users on how to develop KPs at par with each other
2. Increase the number of KPs that are relevant for use of internal and external stakeholders

V. Definition of Terms

Explicit knowledge – knowledge found in documents, records, and files, i.e. recorded and documented knowledge; can be easily obtained, expressed, and put into words

Knowledge – theoretical and/or practical understanding of a particular subject that will improve the innovation and productivity of individuals and groups

Knowledge management – about creating an environment in which people’s experience and wisdom on Social Protection and Social Welfare programs delivery are valued; and where internal processes are structured to support social welfare policy makers, program managers and service providers in creating, sharing, and using knowledge¹

Knowledge product – materials that are developed to convey knowledge. Knowledge from the lessons learned, researches, and experiences of internal and external parties are captured to cater to the needs of prospective users² in taking action effectively to create development results

¹ Knowledge Management Framework for the Department of Social Welfare and Development (DSWD AO 17 s. 2011).

² Ibid.

Process owners – individuals or groups who learn and experience from the work they do. They are considered to be most knowledgeable of the changes, innovations, and history of their work.

Tacit knowledge – knowledge nestled in the experiences, habits, competencies, and routines of staff and officials; difficult to obtain, express, and articulate

VI. Processes for Developing KPs

The processes for developing KPs are vital in producing explicit knowledge available to internal and external users, alike. The different processes of knowledge capture, knowledge codification, knowledge translation, knowledge validation, and knowledge updating are conceptualized such that different OBSUs may find these tasks achievable and attainable.



Figure 1. Process flow for KP Development Process. This figure shows the sequence of the sub-processes in the development of KPs.

A. Knowledge Capture

The first step in developing KPs is knowledge capture. It is the process of acquiring knowledge from individuals and institutions that are considered invaluable in the endeavors of other people the former may or may not interact with. Knowledge must be captured as soon as it is identified in order to avoid: losing it upon personnel turnover; losing vital information (e.g. solutions to challenges that arose for a particular project) due to the passage of time (i.e. disremember, forget, etc.); and/or losing its value when it becomes outdated information. This step helps new personnel understand how experienced ones made their decisions and how these led to successful or unsuccessful consequences.³

Some of the activities that the Department use for knowledge capture include program review and evaluation workshops, interviews, concept mapping, and focused group discussions. Other than these, there are a lot of KM tools that may be used. Some of these tools include case studies, knowledge cafés, rapid evidence reviews, lessons learned sessions, after action reviews, retrospective reviews, and knowledge exchange which may all be found in Annex 1 of this guide.

³ *Knowledge Capture Interview*. (2012) (1st ed.). Retrieved from <http://idbdocs.iadb.org/wsdocs/getdocument.aspx?docnum=36935922>

B. Knowledge Codification

Knowledge Codification is the process of getting people's knowledge into a form that can be communicated independently of those people. The most common method is writing things down and putting them into documents and databases. Other methods include taking pictures, and recording sounds and/or videos. This step is done alongside knowledge translation. Captured knowledge is documented in the most convenient form allowing its visibility, accessibility, and usability that it may be used in decision making and/or planning. That is to say that knowledge codification is the conversion of tacit knowledge into explicit knowledge.

C. Knowledge Translation

Knowledge translation enables users of knowledge products to use a particular knowledge to perform more effective action.⁴ In other words, knowledge translation is a process done to make information more accessible to its intended users, e.g. the DSWD-Central Office develops **policies and guidelines** which are bases in making **implementing rules and regulations** that local social welfare and development workers may use which may still be transformed into **infographics** that our clients may easily understand and follow. In the case above, the knowledge in policies and guidelines were *translated* into implementing rules and regulations which were *translated* further into infographics.

It is easy to mistake knowledge codification and knowledge translation with each other. The important thing is to remember that different presentations of knowledge is needed to make it accessible to different types of audiences.

D. Knowledge Validation

Knowledge validation is a process by which new "knowledge claims" are subjected to peer review and a test of value in practice.⁵ This is an important process before knowledge sharing because it ensures the validity and reliability of knowledge in realistic settings. This may be done through research or field visits.

⁴ Talisayon, S. (2012). *KM 101. Tips in Preparing Effective Knowledge Products* (1st ed.). Asian Development Bank. Retrieved from https://www.google.com.ph/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=0ahUKEwi43_-pnujMAhXF6YMKHbWYDhUQFggbMAA&url=http%3A%2F%2Fsites3.iwlearn3.webfactual.com%2Fcti%2Fknowledge-hub%2Fknowledge-products%2Flearning-notes%2Fknowledge-management%2Fno.-3-tips-in-preparing-effective-knowledge-products%2Fat_download%2Ffile&usg=AFQjCNEap_CTIUkDxhNYrI8QRPWuoiJgIQ

⁵ Knowledge Management Framework for the Department of Social Welfare and Development (DSWD AO 17 s. 2011).

E. Knowledge Utilization

As the name suggests, the knowledge gained from the different knowledge products will be used for a number of purposes. It may be used for training or instruction where junior employees may benefit from the captured knowledge of senior employees. It may also be used in planning or decision making where the likely outcome of some actions may be inferred based from what has already been experienced and corrective action may be taken; knowledge from previous experiences may also aid in devising an entire course of action before actual steps are taken. There are a number of different types of KP, some of which are listed and defined in Annex 2 of this guide.

To enable optimal knowledge utilization, a copy of all KPs—as described in Annex 2—authored, produced, published, sponsored, and/or approved by the Department and its corresponding OBSUs and FOs must be endorsed to the Knowledge Exchange Center (KEC). The KEC will then make said KPs available as part of its collection.

F. Knowledge Updating

Using the knowledge gained will lead to new knowledge or experience that may also be used to update what already exists. This step is crucial in ensuring that the knowledge products are up-to-date. Knowledge products must be updated from a month to a year after its development, depending on the type and the judgment of the writer.

VII. Recommended Workflow for Developing Knowledge Products

Not including knowledge updating, which is done depending on the type of material, most KPs share a similar process flow that ensures the quality of each one. Annex 3 shows the generic business process model for the development of KPs with details of each step in the process. (*Note: There are only 7 recommended steps in the development of KPs, each one with a different number of actions or activities as shown in figure 2.*)

Step 0: Identify topic for KP

The process is triggered when the need for the development of a KP is observed. This may arise from the analysis of KM initiative reports, KP needs surveys, or when a process owner becomes conscious of the value of *how they do* their work and realize that others may benefit from it as well.

The chosen topic must reflect the Department's thrusts and priorities and should promote productivity and/or innovation at work. Since the development of KPs would require resources, it is important that these are made with a specific purpose in mind.

Step 1: Get approval for KP topic

Before any resource is used for the development of the KP, one must first ensure that the process is sanctioned by their immediate supervisor. The process is part of one's work but it

should not divest necessary resources (i.e. time) from the commitments of the individual and their office.

Included in this step is the development of an outline that one’s immediate supervisor must approve of.

Step 2: Conduct research

KPs are best developed by process owners or the individuals and groups who are responsible for satisfying the objectives of particular projects/programs/activities. However, it is also possible that the individual tasked to develop the KP has not encountered the process before. Regardless of the identity of the one tasked to develop the KP, research is needed to ensure that the KP will meet the qualities of a good KP as articulated in the next section.

Research may be done by analyzing existing knowledge (armchair research) or collecting new information and data (field research). Either way, the content author must ensure the accuracy and relevance of the knowledge they will incorporate in the KP to be developed. This may be aided by ensuring proper citation of the references used in the development of KPs. There are numerous ways to cite references and a number of formats to be used. Below are examples of citation of various references using the APA (American Psychological Association) format:

| Instead of... | Use... (APA Format) |
|---|--|
| Mr. Juan Dela Cruz, PDO IV | (J. Dela Cruz, personal communication, May 17, 2008). |
| GP Guidelines | Knowledge Management Division-Capacity Building Bureau, DSWD. (2016). Administrative Order 05 series 2016: Good Practice Documentation Guideline. Quezon City, Philippines: DSWD. |
| KEC Operations Manual | Knowledge Management Division-Capacity Building Bureau, DSWD. (2012). Knowledge Exchange Center Operations Manual. Unpublished material. |
| http://betterevaluation.org/sites/default/files/Preskill_Using%20Appreciative.pdf | Preskill, H., Ph. D. (2007). Using Appreciative Inquiry in Evaluation Practice [PowerPoint slides]. Retrieved from http://betterevaluation.org/sites/default/files/Preskill_Using%20Appreciative.pdf |
| http://thewritepractice.com/six-ways-to-ask-better-questions-in-interviews/ | H. (2014, November 25). Six Ways to Ask Better Questions in Interviews. Retrieved February 02, 2017, from http://thewritepractice.com/six-ways-to-ask-better-questions-in-interviews/ |
| Wikipedia | Denotation. (n.d.). In Wikipedia. Retrieved October 9, 2016. |
| Handbook of Technical Writing | Alred, G., Brusaw, C., and Oliu, W. (2009). Handbook of Technical Writing (9th ed.) Boston: Bedford/St. Martin’s. |

Step 3: Develop first draft

It is possible that the development of the KP coincides with the research done for it. However, the order of the steps emphasizes the need for research *before* the actual development of the KP.

Depending on the resources and personnel available, the layout and design (or packaging) may or may not be included in the development of the first draft. The inclusion of this activity in this step stems from the fact that *some* KPs need to be presented in such a way to fully communicate the knowledge it needs to convey.

Step 4: Evaluate KP

Internal colleagues need to evaluate the KP. This step is done under the assumption that one's internal colleagues hold valuable knowledge about the topic that may aid in the development of the KP. The comments and inputs may be on the content and how the packaging helps convey this to the targeted audience, but must focus on the former.

Step 5: Enhance draft

This step may seem inefficient in the BPMN (Business Process Model and Notation) of the process as it is repeatedly being done throughout. However, the process requires an extensive assessment process to ensure that the developed KP not only reflects the branding and core values of the Department, but also the focus and urgencies from the perspective of the Department's Leaders at the time the KP is being developed.

Step 6: Assess quality of KP

Assessment of the developed KP is done on varying levels depending on the type and scope of the material. KPs which will only be used within the office of its developer will only need the approval of the latter's Head, while those which will be spread to a wider audience may or may not need comments and inputs from SWIDB and/or approval from the developing office's Cluster Head or the Department Secretary.

This step is important in ensuring that KPs with a wider scope and audience are indeed representative of the Department and reflects its existing policies, guidelines, beliefs, or principles.

Step 7: Use KP

This step punctuates the reason why KPs are developed: to be used to promote innovation and/or productivity in the delivery of Social Welfare and Development (SWD) programs and services. It also aids in determining the need to enhance a developed KP and when to do that after users of a particular KP (and the individual or group who developed it) deem it fit.

VIII. Qualities of a Good KP

A good KP does not only spark interest nor provide information that may be stored for future use; instead, it facilitates effective action. IEC materials differ from KPs in this way and are not considered KPs *until these communicate how to act effectively to its audience.*

KPs, regardless of media presented in, are means for communication. Good KPs are ones which relay their message across so its audience are capacitated for effective action. Below are the 7

C's for communication⁶ with examples that showcase adherence and non-adherence to them. When followed, a good KP is made. (Note: The 7 C's for communication may be applied to other media KPs are presented in like videos, audio-visual presentations, audio materials, etc. but for obvious reasons, the examples given mostly apply to written material.)

A good KP is:

1. Clear;
2. Concise;
3. Concrete;
4. Correct;
5. Coherent;
6. Complete; and
7. Courteous.

Clear

A clear KP ensures that the audience fully understands the message it conveys. For a KP to be clear, it must be specific with no parts subject to interpretation. Every audience who will read/watch/hear the KP must receive the message the KP was intended to communicate.

Not an example of clarity

The project was very good. It helped the residents of the area to have a chance at overcoming poverty and building themselves a new life. Even the mayor was so convinced that he signed a resolution in support of it. Consequently, it is very easy to replicate and will do others a great deal of satisfaction if they do.

What is the project about? The paragraph above does not convey many important details about the project that may give its audience an idea on why it was a good project. By not mentioning the details about the area it was implemented in, it lacked context. It even failed to mention what the resolution the mayor signed was about. Its audience wasn't given enough information to decide for themselves if this project is something that they need or can do to replicate it.

Since KPs facilitate effective action, they need to provide information on how its audience can repeat the desired result that the subject of the documentation (project) has accomplished.

Example of clarity

The project was able to provide jobs to 85% of the Pantawid Pamilya beneficiaries in Hipon City⁷. It helped the residents have a steady source of income that will help augment their daily needs. Even Mayor Sugpo⁸ was so convinced that she signed

⁶ https://www.mindtools.com/pages/article/newCS_85.htm (Mind Tools Content Team, 2010)

⁷ Fictional city

⁸ Fictional name

Resolution No. 01, s. 2017 or a Resolution Giving Priority to Qualified Residents of Hipon City on All Contractual Jobs on the Construction of Roads and Highways. Other areas who wish to replicate this may refer to the Implementation section of this paper to be guided on how they may do so.

This example is better because it gives its audience the necessary details (context, strategies, etc.) that may help them decide if this intervention will benefit them or not.

Concise

Keep it short and simple (KISS). The intended audience for KPs include program handlers and policy makers. These are the kind of people who have much at their hands and it would be better for them if they could quickly and easily access important information from KPs. Things to look out for:

- Can the words used be replaced by much simpler and easier to understand ones?
- Are the points in the KP unnecessarily redundant?

Not an example of conciseness

A number of devastatingly malnourished and undernourished kids, 24 of them, had been lucky enough to have received help from the program that aims to provide delicious and nutritious food to hungry children.

It was Barangay Calayaan who gratefully and graciously hosted the program seven (7) days prior to the publication of this article.

This example may be shortened and may be made easier to understand if we keep it concise.

Example of conciseness

Twenty-four (24) kids benefitted from the feeding program in Barangay Calayaan last week.

It is very noticeable how a couple of paragraphs have the same meaning as the single sentence above. The latter example is stated more simply, thus easier to understand.

Concrete

A concrete KP gives its audience a clear picture of its message and provides the necessary details needed for it to be understood.

Not an example of concreteness

The program was very helpful in the office.

The example was unclear and provided its audience a vague depiction of what it can do. If left this way, it would provide a very weak case in convincing others that it is indeed “very helpful”.

Example of concreteness

The Excel program that the procurement officer shared with us had been very helpful in calculating the budget for our training proposals.

This one tells us that the mentioned program was developed using Excel and aids in calculating budgets. It provides a clear picture of what it does and how it helps staff to perform better.

Correct

The Department’s KPs are its representations and must bear accurate and consistent information to avoid compromising its credibility to the public. A correct KP could aid its audience in adopting more efficient and effective practices in the workplace. Things to watch out for:

- Is the language used at the level of the intended audience?
- Are all data, titles, names, etc. accurate?
- Does the KP (written) have no spelling and or grammatical errors?

Not an example of correctness

Last September 31, 2016, at the start of the fish conservation week, a number of Division Chiefs from the Central Office participated in the opening ceremonies.

A quick read of the statement above may show no problems but careful inspection would reveal that the date mentioned does not exist and the word “week” was incorrectly spelled as “weak”. Errors such as these two may not show in electronic spell checkers; for this reason, proofreading must be meticulously done.

Coherent

When a KP is coherent, the flow of information is logical; there is smooth transition from one topic to the next and the audience can easily follow information as it progresses. Aside from this, there are no stray topics, instead, all are connected and form one story together.

Not an example of coherence

The residents play games on the activity area. The activity area is also the venue for the meetings of the committee that plans different strategies that may be done to generate more money. The money generated helps in sustaining the operations of the center.

The example above leaves its audience with more questions than answers: what about playing in the activity area? The author mentioned it but quickly moved on to discuss another use of the activity area.

Example of coherence

The residents play games on the activity area during their free time. Since the introduction of free play, the residents have exhibited less aggression in times of frustration and have even started to be more receptive to the interventions provided to them.

In the second example, you will notice how the story on money-generation was omitted. It focused on the residents playing games and gave a clearer picture on the benefits of free play.

Complete

When a KP is complete, it provides its audience details that will enable them to *take action* when necessary.

Not an example of completeness

The practice is very easy to replicate: implementers need to ensure that the barangay and its LCE (local chief executive) are also invested in it.

This is a bad example because it doesn't inform the audience how they may ensure that the barangay and its LCE are invested in it.

Example of completeness

The practice is very easy to replicate. To ensure the participation of the barangay residents, an FGD (Focus Group Discussion) was conducted to surface their concerns and ask for ways these may be resolved. After, a meeting with their barangay chairman was set where minutes from the FGD were presented to him. Since the needs of his constituents were clearly surfaced in the meeting, he pledged his support for it and discussed which actions may be funded and which ones had to be funded by other sources.

This one clearly relays to the audience what had been done to ensure the participation of the barangay and their LCE. It provides the latter an idea on how to act so they may achieve the same desired results.

Courteous

A courteous KP is professional, open, and honest. It does not introduce claims not backed up by evidence especially if these may cause harm to others. It is considerate to its audience and is sensitive to various social categorizations (e.g. sexuality, gender, ethnicity, etc.).

Not an example of courtesy

The students drop out of school because their parents lacked the necessary skills to discipline them: the latter lacked education and do not practice proper family planning; they do not care about their children, instead they would rather gamble their hard-earned money than invest this in a better life for the kids.

When writing KPs, it is very easy to put the blame to individuals or groups that seem to be the problem on the surface level. However, this is an irresponsible thing to do especially if the claim is not supported by documented evidence. Even if the claim is backed up by evidence, there is always a better way of communicating sensitive issues as the one above. Otherwise, statements like this may create a divide at best and a lawsuit at worst.

Example of courtesy

The students drop out of school because of a number of different reasons: they look for work to aid in augmenting the needs of the family; they lose interest in studying; they grow tired of the distance of the school from their home; and other such reasons. Most of these reasons point to poverty as the main reason why many students are dropping out of school.

This is a better example because it doesn't unnecessarily blame anyone for the high dropout rate, rather, it aids the audience to see the common theme behind the identified reasons.

IX. Criteria of a Good KP^{9, 10}

The documents that the Department produce have various purposes, thus, each one is expected to deliver the set objective each one serves. Below is a set of criteria and sub-criteria derived from Technical paper 5 of the Simplification Centre that may improve the clarity and usability of these documents.

| Criteria | Description of the Criteria |
|-------------------|---|
| Language Criteria | How easy it is for people to understand the words |
| <i>Directness</i> | Using direct language to make clear who's doing what. |

⁹ Evans, M. (2011). *Benchmarking Everyday Documents*. Simplification Centre. Retrieved from https://www.reading.ac.uk/web/files/simplification/tech_paper_5.pdf

¹⁰ Waller, R. (2011). *What Makes a Good Document? The Criteria We Use*. Simplification Centre. Retrieved from <https://www.reading.ac.uk/web/files/simplification/SC2CriteriaGoodDoc-7.pdf>

| | |
|--------------------------------|---|
| <i>Plain words</i> | Extent to which the vocabulary is easily understood. |
| <i>Grammar and punctuation</i> | Conformity with the practice of good standard English. |
| <i>Readability</i> | Ease with which the reader can follow the argument of the text. |

KPs that meet the Language Criteria, use direct and plain language that follows basic rules of grammar and punctuation. The document is coherent and fosters the immediate accessibility of knowledge to its users.

| | |
|-------------------------|---|
| Design Criteria | The visual impact of the document and the way its design influences usability. |
| <i>Legibility</i> | Use of legible fonts and text layout. |
| <i>Graphic elements</i> | Use of tables, bullet lists, graphs, charts, diagrams, etc. |
| <i>Structure</i> | Quality of the document's organization in relation to its function. |
| <i>Impression</i> | Attractiveness and approachability of the document's overall appearance. |

Meanwhile, those that meet the Design Criteria, use exceptional typography (e.g. font styles, font size, font face), graphic elements (e.g. data tables and graphs), and white space that increases its approachability and the accessibility of the knowledge it offers.

| | |
|------------------------------|---|
| Relationship Criteria | How far the document establishes a relationship with its users |
| <i>Who from</i> | Is it clear who is communicating? |
| <i>Contact</i> | Whether there are clear contact points and means of contact. |
| <i>Audience fit</i> | Appropriateness to the knowledge and skills of the users. |
| <i>Tone</i> | Matching the style and language to the context. |

On the other hand, those that meet the Relationship Criteria is consistent with the Department's branding guidelines, provide details on who and how to contact authorities that may answer the user's concerns on the KP, and use appropriate style and language to the knowledge and skills of its intended users (e.g. policy makers, students, beneficiaries, or local and national officials). The details and amount of technical vocabulary to be used depend on the audience.

| | |
|--|---|
| Content Criteria | How the content and the way it is organized deliver the document's purpose |
| <i>Relevance</i> | How relevant the content is to the recipient. |
| <i>Subject</i> | Whether it is clear what the communication is about. |
| <i>Action</i> | Clarity about what action is required of the user. |
| <i>Alignment</i> | Compliance with the organization's intended aims and values. |
| <i>Source: https://www.reading.ac.uk/web/files/simplification/SC2CriteriaGoodDoc-7.pdf</i> | |

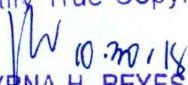
Lastly, those that meet the Content Criteria have relevant content for its target users, have clear subjects, and communicate clearly what action is expected from its users. These comply with the Department's intended aims and values.

When applicable, the content of a KP must be verified. Results and impact of projects/activities/programs must be monitored to ensure sustained efficiency and effectiveness of its implementation.

X. Review and Revision

This guide will be subjected to reviews and revisions if circumstances prove these necessary.

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Annex 1. KM Tools for Knowledge Capture¹¹

1. Case Studies – a form of problem-based learning, where a situation that needs a resolution is presented. A typical case study is a detailed account, or story, of what happened in a particular company, industry, or project over a set period of time. The learner is given details about the situation, often in a historical context. The key players are introduced. Objectives and challenges are outlined. This is followed by specific examples and data, which the learner then uses to analyze the situation, determine what happened, and make recommendations.

Sample template of a case study:

| ELEMENTS | DESCRIPTION | GUIDE QUESTIONS OR COMMENTS |
|---------------------|--|---|
| Introduction | Defines the problem to be examined and explains the importance or relevance of studying the case | <ul style="list-style-type: none"> <input type="checkbox"/> What is the problem, situation, or challenge that will be examined in the case study? <input type="checkbox"/> What is interesting about the topic? Why should it be studied? |
| Overview | Provides a scenario of the situation including details about the various players involved, theoretical issues related to or arising from the situation, budget allotment, organizational setup, etc. | <ul style="list-style-type: none"> <input type="checkbox"/> Why did it happen? <input type="checkbox"/> Who are involved in the situation? <input type="checkbox"/> When and where did the situation occur? <input type="checkbox"/> What are evidence supporting the occurrence of the situation? <input type="checkbox"/> Use graphics, tables, or charts to organize well information or ideas. |
| Action Taken | Describes actions on the matter and may include statements from key players about their intentions for resolving the issue | <ul style="list-style-type: none"> <input type="checkbox"/> What action was made to solve the problem or handle the situation? <input type="checkbox"/> Who are key players in this solution? <input type="checkbox"/> How was the solution or action implemented? <input type="checkbox"/> What happened after the solution was implemented? |
| Case Problem | Question/s that a learner needs to analyze or solve. | <ul style="list-style-type: none"> <input type="checkbox"/> Provide possible situation/s that the learner can analyze and solve. <input type="checkbox"/> Assign a position to the learner and set a task given that position. <input type="checkbox"/> Illustrate a scenario and ask learners to analyze the faults and recommend how it should have been handled. |

2. Knowledge Cafés – a form of dialogue that engages participants to enjoin in an open and creative conversation where people share ideas and learn from each other on a topic of mutual interest.

¹¹ Razalan, N. (2017). Module 4-KM Tools for LSWDOs [PowerPoint Slides]. Unpublished.

How to conduct a Knowledge Café:

- 2.1 Prior to the actual conduct of the Knowledge Café, prepare three (3) questions of the participants’ topic of interest. The questions must be open-ended to elicit the participants’ knowledge and feelings on the given topic.
 - 2.2 Prepare a large sheet of paper, at least 23x35 sq. in, markers, crayons, and other such materials that may be used by the participants to express their answers. Each group must have a set of these items.
 - 2.3 Ensure that the space to be used is appropriate to the size of your crowd and a separate table may be used by each of the groups.
 - 2.4 On the actual conduct of the Knowledge Café, provide a brief introduction to the topic and how the Knowledge Café is done.
 - 2.5 Divide the participants into three groups and ask them to identify a host. The hosts will remain at their group’s table to welcome new participants, share main ideas, themes, and questions, and encourage guests to link and connect ideas.
 - 2.6 Each group will be given 10 minutes to answer their first question; when the time is up, each group will move to the next table in a clockwise manner until all the groups have visited all the other groups’ tables.
 - 2.7 When they get back to their original groups, they will be given five (5) minutes to synthesize the answers and prepare to report their output.
3. Rapid Evidence Review – review of literature related to a particular issue. It takes note of what has already been done on the issue in question and its outcomes. Conducting an RER aids in avoiding the replication of what has already been done.
 4. Lessons Learned Session or After Action Review – a form of knowledge capture where involved individuals or teams (in a project or activity) recall and reflect on their learnings from the activity right after its conduct and document the results to be used by those who may possibly repeat it.

Below is a table showing the differences between a program evaluation and a lessons learned session or After Action review:

| | Project Evaluation | Lessons Learned Session |
|--------------------|--|---|
| Purpose | To assess outputs against objectives | To document learning and know-how gained |
| User | Project manager/owner, project financier | Practitioners, project staff/implementers |
| Focus | Outputs, outcomes, impacts | Workable tools, templates, processes |
| Nature of Learning | Vertical | Horizontal |
| A Tool of – | Project management | Knowledge management |

5. Retrospective Review – an in-depth discussion that happens after the completion of a program, activity, or project, or activity. It is structured to help the people involved reflect on

the project in detail. It also helps ensure that the lessons learned in any activity are recorded in an objective manner.

During a retrospective review:

1. Identify and review project objectives and deliverables;
2. Identify and review the project plan and planned process;
3. Discuss how success and lessons learned can be applied in the future;
4. Discuss what could've gone better and how.
5. Relay short summaries of main learning points.
6. Knowledge Exchange Session – takes place when an individual is moving from their current position; ensures that organizational knowledge is kept in the organization.

How to do a knowledge exchange session:

1. Two days prior to the knowledge exchange session, knowledge holder receives a copy of knowledge exchange questions
2. Facilitator asks the guide questions
3. Facilitator packages the knowledge for the organization
4. Knowledge is uploaded and shared with the team

Knowledge exchange session questions template:

1. General Information
 - 1.1 What do you consider to be the most valuable and/or unique knowledge that you hold in your current role?
 - 1.2 What aspects have made the largest contribution to you learning what you know?
2. People and People Skills
 - 2.1 Who are the people you interact with most frequently?
 - 2.2 Who do you consider are your internal and external key contacts?
3. Key Operational Information
 - 3.1 What are the key factors contributing to the successful carrying out of your job?
 - 3.2 Is there any key documentation that you find particularly useful to your role?
 - 3.3 Are there any immediate issues specific to your role that in your view need to be urgently resolved?
 - 3.4 Are there any dormant issues specific to your role that in your view need to be resolved in the longer term?
4. Lessons Learnt and Pattern Recognition
 - 4.1 In your position, what challenges are most likely to occur or should one expect, and how do you usually respond to or resolve these?
 - 4.2 How have you identified and managed potential risks or problems in the past?
 - 4.3 Which mistakes do you think have been made in the past that you think could be avoided in the future?
 - 4.4 Are there any unexploited ideas or potential improvements/innovations that you want to mention? This could apply to the organization itself or to the whole sector.

- 4.5 Are there other roles that you perform (officially or unofficially) in the organization? Also, mention anything else generally of which you think we should be aware.

Annex 2. Types of Knowledge Products¹²

The types of KPs defined below are not differentiated by the media by which they are produced but by the purpose each one serves.

1. Advocacy Materials

Educates, persuades, and mobilizes the Department’s partners and stakeholders to support the Department’s policies, programs, projects, and activities that promote the welfare and development of our clients.

2. Learning Materials

Supports existing materials for LDIs; used for the conduct of the latter with accompanying Facilitator’s Notes (e.g. modules, case studies, graphic stories, etc.).

3. Good Practice and Success Story Documentations

Documents the positive results and impact of particular approaches or methods in real practice, i.e. practices that have been proven to improve innovation and productivity in the workplace.

4. Research and Development Materials

Illustrates the impact or potential improvement of the Department’s activities/projects/programs/services (e.g. Theses, M&E results, Lessons Learned papers, concept papers, etc.).

5. How-to Guides

Provides guidance and methodological support on the conduct of activities/programs/projects/services related to the Department and/or its staff (Operations Manuals, User’s Manuals, Training Manuals, Guidelines, Operating Procedures, etc.).

6. Lessons Learned Documentations

Documents reflections on past practices (on programs, projects, etc.) that provide concrete recommendations for improving DSWD’s performance in the future.

7. Needs Identification and Verification Materials

Aids in identifying necessary requirements for the delivery of quality and appropriate services/activities/interventions for our clients which may or may not be a part of the Department (Learning Needs Assessments, Satisfaction Surveys, etc.).

¹² Adapted from “Types of Knowledge Products. (n.d.). Retrieved March 09, 2017, from <http://www.schools-for-all.org/page/Types of Knowledge Products>”

8. Institutionalization Documents

Aids in establishing conventions or norms that are important to the functions of the office (e.g. sustainability plans, business process models, ongoing budget and staff allocations, etc.).

9. Internal Evaluation Materials

Expresses thoughts and ideas on past actions or activities/projects/programs/services that may contribute to the enhancement of future work (e.g. exit interviews, feedback reports, post-activity evaluations, etc.).

10. Uptake and Implementation Materials

Exhibits what and how jobs are done per office (e.g. job roles, job descriptions, stipulated job outcomes, IPCs, etc.).

Annex 3. Knowledge Product Development Process – Business Process Model and Notation

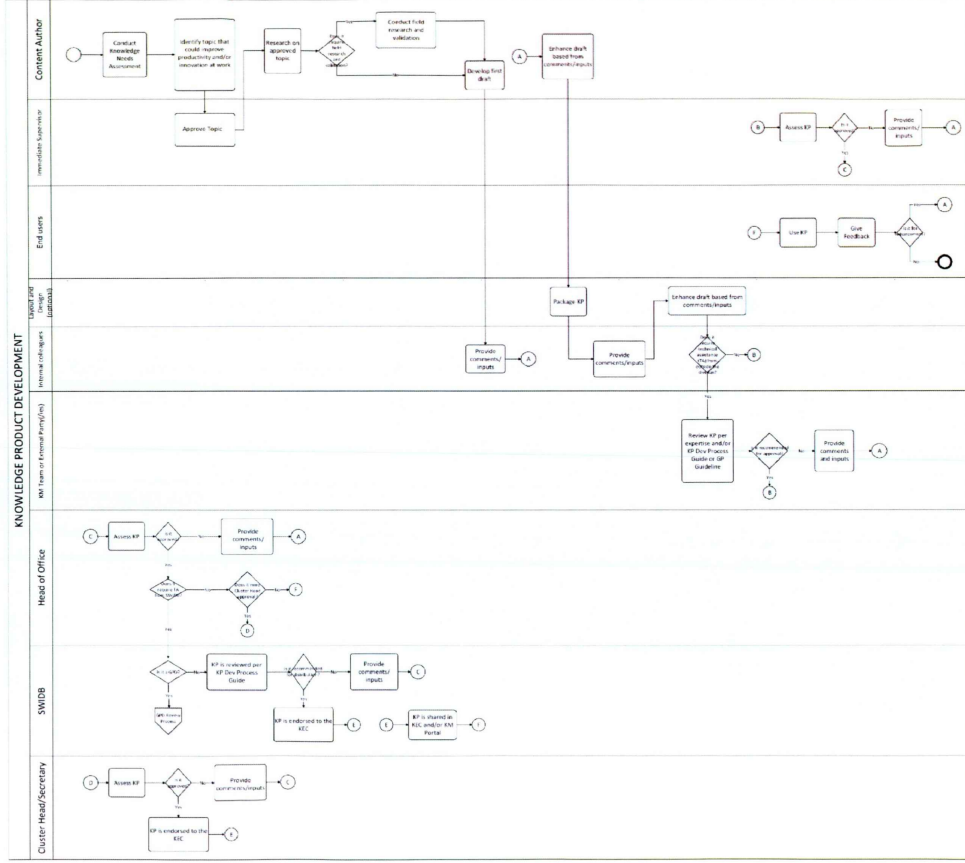


Figure 2. Business Process Model for KP Development Process. The figure shows a graphical representation of the coordinated flow and interaction patterns of the actions or activities involved in the development of KPs.