

# KALIF: Lessons on Lessons Learned Sharing

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## Abstract

This paper reports on work done on KALIF, a knowledge and learning infrastructure to facilitate knowledge sharing among 16 EC-funded research projects. The knowledge management measures consist of a people framework and an IT framework. The people framework is a coherent set of knowledge markets, sharing days, learning events and clinics, whereas the IT framework is a repository of the results of the activities undertaken in the people framework.

## KALIF objectives

KALIF (Knowledge And Learning InFrastructure) is a project within the Esprit IT and Learning and Training for Industry (LTI) thematic programme. ESPRIT is a European funding programme to support the development of innovative IT. KALIF runs from September 1998 until March 2001 and is one of 17 projects funded in the LTI programme. The KALIF project is joint initiative of Kenniscentrum CIBIT (www.cibit.nl) and the European Consortium for the Learning Organisation (ECLO, www.eclo.org) and its objectives are to:

- Improve the visibility of the LTI projects, products and knowledge;
- Optimise knowledge sharing between the LTI projects;
- Help capture and capitalise on lessons learned within the LTI projects;
- Stimulate establishment of broad and sustainable community of practice beyond the life of LTI programme.

Although KALIF is a project within the LTI programme, it acts as a type of 'concertation' (In EU project vocabularies, concertation is the act of bringing together different projects for a common purpose) project although it differs significantly from traditional forms of concertation activities in Esprit programmes. In fact, KALIF is among the first of projects in this context to adopt knowledge management principles to serve concertation objectives.

## Background

Given that the projects in an EU research programme are all working in a very similar context, there are shared experiences in the execution of project activities and similar problems and issues are often encountered.

The challenge at the start of the KALIF project was to design a service package for the LTI programme that would primarily facilitate the exchange of experiences and would provide a platform for common problem solving on joint issues within the LTI programme. Working from the knowledge pump concept (Van Heijst, Van der Spek, Kruizinga, 1996) and the principles of knowledge infrastructures (Van Heijst, Kruizinga, 1998), we developed a package that balances a human solution (the KALIF people framework) and an IT solution (the KALIF IT framework). The services in the package are described in the following paragraphs.

## KALIF services

### KALIF people framework

To date, KALIF essentially provides projects with 5 types of meeting opportunities, all facilitated by KALIF:

An initial *KALIF knowledge market* aimed at finding similarities between projects and at gearing KALIF's services to the wishes of the projects. Furthermore, ways of working (WoWs) are presented and discussed to allow projects to format and capture lessons learnt. These WoWs were to be disseminated in the projects by the KALIF contacts, our ambassadors in the projects;



*KALIF knowledge market*

*Learning events* for each of the projects, organised by members of the KALIF team. These learning events are meetings that coincide with milestones of projects when the KALIF support officer reports on lessons learnt from other projects and 'harvests' lessons learnt from the project concerned.

**Sharing days.** Where projects come together for sharing days, common issues are related to the very specific context of the common research action line and its objectives. These events are highly participative focusing closely on the real issues faced by those present. Together with the recently introduced clinics, the workshops provide an opportunity to build a sense of mutual trust between the projects and KALIF and among the projects themselves;

**Clinics.** KALIF also offers customised support to individual projects in LTI programme wide areas such as marketing, intellectual property rights and evaluation.

## KALIF IT framework

Further to the facilitated meetings, the KALIF web site ([www.kalif.org](http://www.kalif.org)) offers registered users from the projects the following basic functionality:

**A knowledge map.** A web based application that makes it easy to find people in the project teams by their knowledge and experience. The map provides facilities to find institutions and companies that are linked to the projects. Furthermore, the map provides a detailed summary of the projects.

**A document repository.** A document base that allows the knowledge-guided retrieval of documents. This document base is intended for both internal (the projects) and external (a wider audience) use. One important set of documents in the repository is the collection of lessons learned documents generated during the learning events.

A lessons learned document consists of the following attributes:

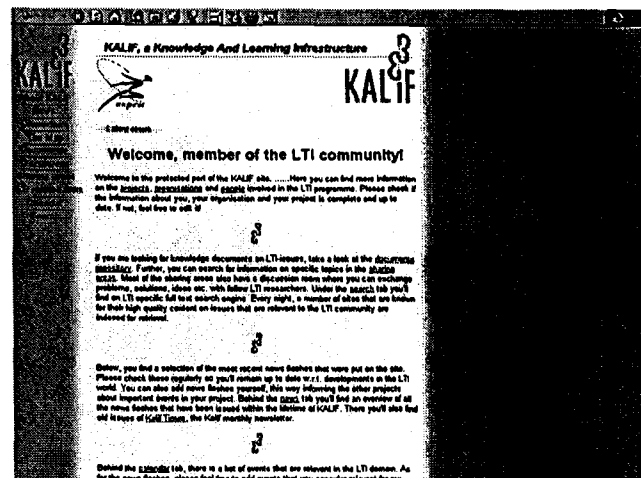
- A status field (to be approved by source, approved by source);
- A distribution field (indicating the distribution level of the lesson, e.g. project consortium, the LTI programme, EC projects, public);
- A source field (name of the source);
- An author field (name of the author);
- A sharing area field (containing the name of the sharing area to which the lesson pertains)
- A topic field (containing a short description of the topic of the lesson);
- A one liner field (a single sentence describing the lesson);
- A context field (containing a detailed description of the lesson).

As an example of the relation between the people framework and the IT framework, the value in the sharing area field refers to the sharing areas that were identified in the knowledge market. Furthermore, during learning events, the KALIF facilitator that guides the debriefing process uses the sharing areas as prompts to elicit lessons from the projects.

**A news and calendar service.** The web site has a comprehensive calendar of forthcoming conferences,

workshops and trade shows, and has a news repository, that also contains issues of the LTimes, the electronic newsletter compiled by the KALIF team. This news and calendar service has a public part, so that outsiders to the projects are able to view parts of this information.

**Discussion facilities** The KALIF web site allows electronic discussion between the people working in the different projects.



KALIF web site

The KALIF web site is built on a Lotus Domino platform, and uses Muscat indexing and search facilities. Recently, the KALIF project has launched a portal site ([www.lti-portal.org](http://www.lti-portal.org)), using the same Lotus Domino platform that allows the general audience to inspect the public parts of the original KALIF site.

## KALIF dissemination services

KALIF also helps to collect and package of products from the meetings and web site in order to leverage these to a wider audience. As the LTI programme is not a stand-alone exercise, KALIF will package and summarise knowledge products for a wider audience in a format that is comprehensible to non-experts. The KALIF web site is a major means for doing so, but a 'wallet' filled with leaflets on the LTI projects is also being produced. The other way round, KALIF collects and packages, through an observatory, relevant developments from in- and outside the EC that will be captured and fed back into the projects via the web site and the meetings. Also, special exhibition booths have been developed to serve as a promotion toolbox for the joint projects.

## Key data

To date, 154 project members have subscribed to the KALIF web site, accessing it 500 times/month on average. This user community represents over 100 organisations in Europe, spread over 15 countries. The KALIF team consists of 5 persons, 3 of which reside in an office in the Netherlands, and 2 reside in two places in the UK. The KALIF has a labour budget of 46 person months,

stretching over a period of 36 months, and a total financial budget of 660.000 Euro, roughly 660.000 US dollar.

During the initial knowledge market, 8 sharing areas were identified to which later a ninth was added. The sharing areas were elicited by a process in which project representatives were asked what they had on offer for sharing and what they would like to bring home from the market. These sharing areas became the organising principle for the KALIF web site as well as became the focal point for learning events, sharing days and clinics.

The KALIF team has organised 6 sharing days and 10 clinics. During learning events, on average 20 lessons learned documents were reported. Hitherto, 15 learning events have been held. The lessons learned were categorised in 9 sharing areas.

### **Lessons learned**

We have recently begun the important process of evaluation of KALIF against its original objectives and have gained insights into how the projects viewed KALIF in its initial efforts to communicate its ambitions.

The evaluation framework we use basically comprises of a set of performance indicators per objective, performance criteria per indicator and of course performance standards per criterion. Four streams of input feed the evaluation process:

**Systematic collection of so-called 'chronicles'**, reports on all activities in the people framework;

**Measurement of web activity**, in terms of number of hits, origin of hits, downloads, etc.;

**Evaluation 'exit interviews'** with project managers and/or KALIF contacts, 4-6 weeks before project is closing. Probes during these interviews are: Intuition, perception and attitude, Learning and Knowledge Sharing, Economic Effectiveness and Impact;

**Collection of expert opinions** on e.g. web usability.

Frankly, at the start of the project, KALIF was seen as a tax - a burden, and additional bureaucracy imposed upon an unwilling community. This reflects the fact that it is not always natural for a group of projects to start sharing knowledge.

In the kick-off knowledge market, participants were asked to adopt a metaphor (a living creature) that symbolised how the projects saw themselves internally and their external relations. The KALIF team adopted the symbol of a bee with its connotations of cross-fertilisation. The immediate reaction from some of those present was to state categorically 'but bees have stings', reflecting that KALIF could easily be regarded as the EC's means to control projects, not to facilitate exchange. It became obvious to us that we faced a challenging environment.

It was not until the first sharing day, that we recognised a change in attitude and a more supportive cluster of community members emerge.

Once the projects felt that they had ownership of KALIF, they changed from a skeptical and possibly hostile stance to an increasingly supportive and participative role. This is also reflected in the outcomes of our evaluation work. We learned that:

To be successful, KALIF must act as an exemplar role model (in willingness to share, to be open how we could do things better);

KALIF needs to be responsive to project feedback and requirements: important challenges for project management emerge;

To implement knowledge management in a multi-lingual, multi-cultural, potentially competitive environment is difficult and different from working within the relatively safe boundaries of a single organisation. What works is to prove that one can save projects time and effort, and to invest in knowledge sharing on common ground issues;

The people framework is crucial, and KALIF should invest the time it has reserved for it fully. The connection between the people framework and the IT framework should be seamless, a direct feedback of any meeting in the people framework through the IT framework is crucial;

The IT framework should undergo rigorous and very active content management;

Most of the effort should come from KALIF to implement the KALIF ways of working: a 75-25 distribution of effort between KALIF team and KALIF contacts seems OK;

Personal meetings are important and should be held as early on the timeline as possible;

Re-usable sharing 'instruments' with great potential for further use in the EC environment have been found (IPR, evaluation);

Continuous action planning and revision is necessary if you want to keep pace with project community dynamics. This has proven to be quite hard within the EC project management framework;

An evaluation framework has proven helpful in guiding activities and should have been implemented from the start of the project;

In order to be able to access expertise needed to help projects, it is beneficial to be able to fall back on networks of expertise.

### **On reflection: success factors**

Given our experiences so far, KALIF considers its unique features to be:

**Relationship building** - taking time to establish trusting relations with the projects community.

**Customisation** - ensuring tools and techniques are adjusted to the immediate needs of the projects community.

**Professional contributions** - bringing expertise and ongoing research to KALIF applications.

**Networking** - drawing on existing networks for knowledge management and learning organisations and continually seeking new contacts to resolve issues.

**Facilitative** - using methods for supporting participants' needs that are non-directive.

**Membership** of the same community of practice

**Adding value** - attempting to assess benefits of sharing as well as capturing collective lessons learned on behalf of the projects community.

**Responsive** - members to support the establishment of evaluation, marketing or other plans and organising sharing days, following requests from community members.

**Proactive** - disseminating information and ideas that may assist members of the community.

**Reflective** - continuously evaluating lessons learned using an evaluation framework.

**Open systems approach** - viewing immediate community as part of a global community

**Action learning approach** - ensuring opportunities for reflection on the experiences in the KALIF project are captured and disseminated.

### Next steps

In the remainder of the project's time span, we will focus on helping the projects to disseminate their results to the marketplace. This will entail the production of marketing material and presence at key events. Furthermore, we have set up a web portal ([www.lti-portal.org](http://www.lti-portal.org)) to serve as a focal point for content related to IT for Learning and Training in Industry. The KALIF team will act as content managers for this site. Furthermore, publications are planned to present our collective lessons learned.

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