ODKM 725 – Knowledge Management & Collaborative Work
Fall 2019

Organization Development and Knowledge Management
Schar School of Policy and Government
Room 466, Founders Hall
3351 North Fairfax Drive, Arlington, VA 22201

Instructor: Barbara Fillip, PhD, PMP
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Office Location: Room 656
Office hours: 3:00-4:30 PM on Fridays when there is class with advanced scheduling, other times by appointment.

PLEASE READ THE FINAL AND FULL VERSION OF THIS SYLLABUS CAREFULLY, IN ITS ENTIRETY BEFORE THE FIRST CLASS.

Class Overview

The class provides an in-depth look at knowledge management, introducing key models and frameworks for understanding and analyzing all aspects of the Knowledge Management cycle, from knowledge creation and knowledge capture to knowledge sharing, knowledge dissemination and knowledge utilization, emphasizing the collaborative aspect of knowledge work. A range of specific KM processes, methods and tools are discussed (lessons learned, best practices, After-Action-Reviews, storytelling) and some are also practiced in class (knowledge cafes, peer assist). Finally, the class covers the steps necessary to develop a KM strategy and real-world barriers and pitfalls to be aware of in order to lead a successful KM effort within any organization.

School & Class-Specific Policies

Accommodations

If you are a student with a disability and you need academic accommodations, please see me and contact the Disability Resource Center (DRC) at 703 993-2474. All academic accommodations must be arranged through the DRC.

Academic Integrity

Faculty in the Schar School have zero tolerance for academic dishonesty and will strictly enforce Mason’s honor code.

SPP Policy on Plagiarism: The following statement is included in all syllabi.
The profession of scholarship and the intellectual life of a university as well as the field of public policy inquiry depend fundamentally on a foundation of trust. Thus any act of plagiarism strikes at the heart of
the meaning of the university and the purpose of the School of Public Policy. It constitutes a serious breach of professional ethics and it is unacceptable.

Plagiarism is the use of another’s words or ideas presented as one’s own. It includes, among other things, the use of specific words, ideas, or frameworks that are the product of another’s work. Honesty and thoroughness in citing sources is essential to professional accountability and personal responsibility. Appropriate citation is necessary so that arguments, evidence, and claims can be critically examined.

Plagiarism is wrong because of the injustice it does to the person whose ideas are stolen. But it is also wrong because it constitutes lying to one’s professional colleagues. From a prudential perspective, it is shortsighted and self-defeating, and it can ruin a professional career.

The faculty of the School of Public Policy takes plagiarism seriously and has adopted a zero tolerance policy. Any plagiarized assignment will receive an automatic grade of “F.” This may lead to failure for the course, resulting in dismissal from the University. This dismissal will be noted on the student’s transcript. For foreign students who are on a university-sponsored visa (eg. F-1, J-1 or J-2), dismissal also results in the revocation of their visa.

To help enforce the SPP policy on plagiarism, all written work submitted in partial fulfillment of course or degree requirements must be available in electronic form so that it can be compared with electronic database, as well as submitted to commercial services to which the School subscribes. Faculty may at any time submit students’ work without prior permission from the student. Individual instructors may require that written work be submitted in electronic as well as printed form. The SPP policy on plagiarism is supplementary to the George Mason University Honor Code; it is not intended to replace it or substitute for it.

**Attendance Policy**

You are required to attend each class session to receive credit for this class. There is a program wide policy that students are not allowed to miss more than one class and still get credit for the course. If you miss more than one class, you will not receive credit for the course. If you are late, you will lose points toward class participation. If you leave and do not return during the class session, you will lose points toward class participation. If a consistent issue is observed, the ODKM program director will be notified.

**Active Presence/Participation**

**Active listening and engagement** in classroom activities is expected at all times. Electronic devices will be prohibited during certain activities if they become distracting. Active engagement is significantly enhanced when students have done the **necessary preparation** (readings in particular). Finally, the Group Project requires your full engagement as a member of a team. Be a valuable contributor to the Team.

**Virtual Shared Space and Group Collaboration Spaces**

The ODKM 725 Blackboard site will contain detailed information about assignments, including due dates and session-specific reading assignments, a library of links to KM resources and a calendar of KM-related events. A list of recommended books is also included in **Appendix C**.
For the Group Project assignment, groups are free to set up a collaborative space in Blackboard or to use another collaboration platform (or suite of tools) of their choosing.

**Intended Learning Objectives**

The class is meant to help you develop the skills and knowledge of a Knowledge Management professional, by giving you the foundations necessary to embed KM principles and practices in an organization, whether you are playing the role of external consultant, operating within an internal KM team, or simply acting as a KM champion within an organization and supporting collaborative work among your peers regardless of roles and official titles.

All activities (readings, individual assignments, group work) will emphasize practical applications and real-world scenarios.

More specifically, students will:

- Develop the capacity to effectively convey to others in any organization what Knowledge Management is and how it can support the organization’s mission.
- Understand and explain different concepts related to knowledge (tacit vs. explicit, data, vs. information vs. knowledge) and their implications for Knowledge Management initiatives.
- Describe how different organizations have implemented Knowledge Management strategies and what they have learned in terms of what works and what doesn’t work; recognize the factors that affect the success or failure of Knowledge Management initiatives.
- Identify all the steps that would be necessary to develop a Knowledge Management Strategy, to implement it and to sustain Knowledge Management practices within an organization.
- Develop some of the practical skills needed by Knowledge Managers, with an emphasis on skills needed to support and nurture knowledge sharing and collaborative work.

**Course Requirements & Evaluation**

A. **Readings & Associated Quizzes (20 points)**


*The Knowledge Manager’s Handbook* is highly readable and practical, written by practitioners who typically come in to support KM as external consultants. Their book is therefore based on extensive practice in many different organizations. A number of case studies are included. **This is the only book you will need to purchase.**

Additional readings and materials will include a selection of key articles and case studies from different industries and covering a range of organizations (Government, non-
profit, for-profit) as well as relevant videos, podcasts and KM practitioner blogs. Other than the main book mentioned above, everything will either be posted in the virtual space or a link to the resource will be provided. “Required reading” means students are expected to read the material as scheduled and to come to class prepared to discuss and answer questions on the material. With the exception of a couple of seminal articles from the 1990s, the case studies and other articles will be recent (2007-present).

The purpose of quizzes is to reinforce some of the key concepts found in the course materials and to ensure that they are understood or covered more thoroughly as needed during in-class sessions. Quiz questions will be based on the required readings or videos and will be in the form of short paragraph answers. There will be four quizzes, each worth 5 points, for a total of 20 points.

**B. Back-To-Office Report on “The Future of Knowledge Sharing” (5 Points)**

Before coming to the first class, you will view the Keynote delivered by John Seely Brown in 2017 at the KM World Conference. This one-hour keynote address titled, “The Future of Knowledge Sharing” is available on YouTube ([https://youtu.be/_mRlGFgLRFk](https://youtu.be/_mRlGFgLRFk)).

Further essential instructions are found in Appendix A. Get acquainted with the Back-to-Office Report template prior to viewing the keynote. The due date for this Back-To-Office Report is **August 21st, 2019**.

**Evaluation criteria for the Back-to-Office Report:**

- The Back-to-Office Report uses the template provided, is completed thoroughly and submitted by the stated due date;
- Key ideas articulated by the speaker are presented succinctly and in such a way that a reader of this Back-to-Office Report who did not attend the keynote would clearly understand and benefit from the summary. In other words, this is not a summary for your own recollection, it’s a summary for someone who was not there);
- Professional “business” writing, free of typos and grammatical errors. Plain English. This is not an academic paper or an essay. The key is to convey ideas and insights as clearly as possible to facilitate the transfer of knowledge.
- Individual reflections and/or questions based on the keynote are insightful and reflect a serious attempt at interpreting and absorbing knowledge shared by the speaker in the keynote.

**C. Group Project/Action Learning (45 points)**

The project is the backbone of the KM course. It is a hands-on, action-learning exercise in exploring how organizations work from a knowledge perspective. The purpose of the project is to help you learn about knowledge management in practice. What is it? What does it take for organizations to ‘do’ it? Why should the organization care about KM? How well do they do it? Do they realize they need to do it? What gets in the way of their doing it? How can organizations use collaborative tools to more effectively share knowledge? What does it take to do it more effectively? How do you go about advising people and making recommendations?

Your goal is to help an organization (or subcomponent of an organization) get a better understanding of its own knowledge requirements and knowledge flows so that it can take some practical steps to improve its “management” of knowledge critical to its effective operation. The specifics will depend on
the context and needs of the organization. Students will work in groups of 5-7 students. The final deliverable is due on **December 6th, 2019**, when groups will present to the rest of the class.

There are three objectives of this project:

a) Gain a deeper understanding of the need for and challenges involved in creating, storing, sharing, and making effective use of knowledge at work;

b) Learn consulting skills through practice;

c) Reflect on how effectively you share knowledge in a group and work on improving your group KM practices.

The deliverables will be staged in order to simulate a real consulting assignment where payments for services may be made based on receipt and acceptance of specific deliverables at key milestones in the project. In addition, this will allow for feedback from the faculty to ensure that you are on track to deliver an excellent product to the client.

See further details in **Appendix B**.

### Evaluation for the group Project (total of 45 points)

<table>
<thead>
<tr>
<th>Evaluation Item</th>
<th>Due Date</th>
<th>Points</th>
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<tbody>
<tr>
<td>Peer Evaluation</td>
<td>December 6, 2019</td>
<td>5 points</td>
</tr>
<tr>
<td>On-time completion of group deliverable #1a &amp; #1b</td>
<td>September 21, 2019</td>
<td>5 points</td>
</tr>
<tr>
<td>On-time completion of group deliverable #2</td>
<td>November 9, 2019</td>
<td>5 points</td>
</tr>
<tr>
<td>Self-reflection journal entries</td>
<td>Day before each in-class session *</td>
<td>10 points</td>
</tr>
<tr>
<td>Final Presentation and Report – Group deliverable #3</td>
<td>December 6, 2019</td>
<td>20 points</td>
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(* beginning with session 2, see details in the description of this component of the assignment in **Appendix B**.

### D. Case Study Brief (20 points)

The purpose of this assignment is to get you to engage (at least analytically if not first-hand) with a recent, relevant, real-world KM challenge involving **global knowledge sharing and collaboration**. This case study will make use of real background materials and ask you to put yourself in the position of an aspiring KM Specialist or KM Consultant applying for a KM position (real job posting will be provided). As part of the application process, you will be asked to answer three questions. The three questions will test your current understanding of Knowledge Management concepts and your ability to interpret and analyze the background materials from a KM perspective. To respond to the three questions, you will develop a 5 to 7 pages **Case Study Brief** due by **October 12** (Session 3).

Background materials and the three questions will be shared and discussed during Session 1. A Q&A session will be held during Session 2. By the time this assignment is due we will not have covered all the
course materials in class. Therefore, there will be gaps and your answers are not expected to be perfect. The discussion in Session 2 and readings assigned for session 3 will be critical.

After session 3, the focus should be on the Group project.

Evaluation Criteria for the Case Study Brief:
- Demonstrates a thorough understanding of the main issues related to Knowledge Management and collaborative technologies facing the IDEAL Program and adequate background research
- Makes use of course materials/readings/concepts to describe the issues related to Knowledge Management and collaborative technologies
- Identifies 3 or more key clear recommendations/priority actions for the program with regards to KM and collaborative technologies
- Pays attention to instructions, uses professional writing free of typos and grammatical errors, using plain English.

E. Class participation – Individual Reflection Posts (10 points)

Participation by way of attendance and full engagement in the classroom is important in this course. During the last 30 minutes of class (excluding Session 6), students will access the Blackboard platform and write some reflections based on the session’s lectures and activities, to include key takeaways and how they connect to your work or your life. One or more reflection prompts will be provided for each session.

Evaluation Criteria
- Ability to clearly articulate 2-3 key concepts, ideas, or insights presented by the instructor or emerging from the course materials for that session;
- Ability to connect those concepts, ideas or insights to your life, workplace or other personal experience.

Overall Evaluation Summary & Due Dates

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Dates</th>
<th>Points</th>
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<tbody>
<tr>
<td>Back-To-Office Report</td>
<td>August 21st, 2019</td>
<td>5 points</td>
</tr>
<tr>
<td>Group Project</td>
<td>Deliverables 1a and 1b</td>
<td>September 21, 2019</td>
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<tr>
<td></td>
<td>Deliverable 2</td>
<td>November 9th, 2019</td>
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<tr>
<td></td>
<td>Deliverable 3</td>
<td>December 6, 2019</td>
</tr>
<tr>
<td>Case Study</td>
<td>October 12, 2019</td>
<td>20 points</td>
</tr>
<tr>
<td>Quizzes (4 quizzes each worth 5 points)</td>
<td>Sessions 2, 3, 4 and 5</td>
<td>20 points</td>
</tr>
<tr>
<td>Class Participation (5 in-class sessions x 2 points each)</td>
<td>Sessions 1, 2, 3, 4, 5</td>
<td>10 points</td>
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Late submission – generally not permitted – should be negotiated before due dates. Note that students choosing to take an incomplete may be penalized by at least a grade letter.
Letter grades for the course are awarded as follows:

<table>
<thead>
<tr>
<th>Grade Letter</th>
<th>Points Range</th>
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<tbody>
<tr>
<td>A+</td>
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<tr>
<td>A</td>
<td>93-97.99</td>
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<tr>
<td>A-</td>
<td>90-92.99</td>
</tr>
<tr>
<td>B+</td>
<td>86-89.99</td>
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<tr>
<td>B</td>
<td>83-85.99</td>
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<tr>
<td>B-</td>
<td>80-82.99</td>
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<tr>
<td>C</td>
<td>70-79.99</td>
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<tr>
<td>F</td>
<td>Below 69.99</td>
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Course Outline

Session 1 – What is Knowledge Management?

Friday, August 23rd – 5:00-10:00 pm

Agenda

- Course overview
- Introduction of Key KM Concepts (tacit vs. explicit knowledge)
- The Knowledge Management Life Cycle
- KM Frameworks: People, Process, Technology and Governance
- The History and Evolution of Knowledge Management
- KM Processes, Methods and tools: Card sorting and Before-Action-Reviews

Read before class

- Milton & Lambe, *The Knowledge Manager’s Handbook*, Chapter 1: What is Knowledge Management?
Session 2 – Knowledge Capture and Codification
Saturday, September 21st, 9:00 am to 5:00 pm

Agenda

- Identifying critical knowledge, documenting lessons learned and best practices through group facilitation and team collaboration
- The Challenge of Knowledge Continuity (job rotations, retirements) & Retaining Expert Knowledge
- Embedding KM in the Work Flow
- KM Processes, Methods and Tools: Tools to support content management & information architecture (taxonomy, search), collaborative knowledge creation and knowledge capture (wikis), team processes (After-Action-Reviews and retrospects, Knowledge Jams)

Read before class

- Milton & Lambe, *The Knowledge Manager's Handbook*. (Chapters 14 through 17)
  - Part 1: Methods for Generating and Documenting Lessons
  - Part 2: Writing High Quality Lessons Learned

Session 3 – Knowledge Sharing and Dissemination
Saturday, October 12, 9:00 am to 5:00 pm

Agenda

- Knowledge sharing within teams, across projects, and within broader networks
- Collaboration technologies in support of knowledge sharing, tools for Communities of Practice
- Organizational culture and the role of psychological safety in knowledge sharing
- Creating opportunities for knowledge sharing through online and face-to-face collaborative events and interactions
- KM processes, methods and tools: Knowledge sharing workshops, storytelling, Liberating Structures, peer assist, fail share, taxonomies/search, ONA/SNA, Enterprise Social Media, social collaboration tools
- **Guest Speaker:** Mary Lou Theobald
  - Themes: The modern/digital workplace, collaborative tools as a catalyst for organizational change, and the collaborative tools evaluation process.

Read before class

- Milton & Lambe, *The Knowledge Manager’s Handbook*. (Chapters 13, 18, 19)
  [https://youtu.be/LhoLuui9gX8]

Session 4 – Putting a KM Strategy Together
Friday, October 25th, 5:00 pm to 10:00 pm

Agenda

• Key elements of a KM Strategy (revisiting the KM Framework: People, process, technology and governance)
• Steps in developing a KM Strategy
• Knowledge Mapping, Knowledge Audits and related Knowledge Management assessments
• The KM Team: Roles and Responsibilities

Read/view before class

• Milton, N. & Lambe, P. The Knowledge Manager’s Handbook. (Chapters 2-4, 8, 11-12, & 17)

Session 5 – Implementing the KM Strategy
Saturday, November 9th, 9:00 am to 5:00 pm

Agenda

• Deploying strategic pilot activities
• Change management
• Roll-out & adaptive management
• Evaluating Knowledge Management and developing meaningful metrics
• The Future of KM

Read before class

• Milton, N. & Lambe, P. The Knowledge Manager’s Handbook. (Chapters 5-7, 9-10, 18, 20-26)

Session 6 – Group Work and Wrap Up
Friday, December 6th, 5:00 pm to 10:00 pm

Agenda

• Group Work Presentations & Final Reflections

A typical Back-To-Office report (BTOR) is a brief report by an employee who has been away on a mission of some kind, providing colleagues with information about the mission. It is therefore relevant to anyone studying KM as a form of knowledge sharing. This first assignment is therefore both an introduction to the topic of Knowledge Management asking you to view a keynote address on the subject of Knowledge Management, AND an exercise that will require you to practice your knowledge sharing skills.

Before viewing the keynote, read the scenario below and take a look at the Back-To-Office Report template (next pages)

It’s late October 2017. You’ve recently switched over to a new job in an organization you are not yet very familiar with. The Director of your department, Ms. Knowall, was scheduled to attend KMWorld 2017, from November 6 to November 9. KMWorld is one of the biggest annual KM conferences in the world, taking place in Washington, D.C. every fall.¹

Unfortunately, something came up and she is not able to attend. Other employees in the department who could attend in her place are too busy and she knows that you have an interest in Knowledge Management. You’re obviously delighted to be attending in her place. New employees don’t often get this privilege.

No doubt you will learn a lot but she specifically wants you to come back with a Back-To-Office Report on the keynote address by John Seely Brown. Ms. Knowall read Seely Brown’s earlier book, The Social Life of Information, published close to 20 years ago and she thinks of Seely Brown as a thought leader on the cutting edge at the intersection of technology and people.

Here is how the session was introduced in the Conference Schedule:

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**Tuesday November 7, 8:45-9:45 AM**

**Keynote - People & Tech: The Future of Knowledge Sharing**

People are at the core of knowledge-sharing—the key to high functioning organizations. In John Seely Brown’s words, “We participate, therefore we are.” New and emerging technology can only enhance learning, sharing, and decision making to create successful organizations. Join our inspiring and knowledgeable speaker as he shares his view of the future of people and tech working together to share knowledge and create winning organizations.

John Seely Brown, Director, Palo Alto Research Center

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You will find the recording on YouTube @ URL: [https://youtu.be/_mRlGFgLRFk](https://youtu.be/_mRlGFgLRFk)

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¹ We will look at the agenda for KMWorld 2019 in class to see what’s trending in KM.
Upon returning from the conference, you will write and submit your Back-To-Office Report by August 21, 2019, [which is two days before the first class session]. Ms. Knowall was also kind enough to point you to the format she has developed for Back-To-Office Reports that she wants all employees in the department to use to improve knowledge sharing when employees attend conferences or knowledge sharing events on the company’s time and dime. In this specific case, she just wants you to focus your report on the Keynote address, not any of the other sessions you will attend. She also knows that you are new to the organization, and therefore she is not expecting you to come up with typical recommendations for actions that the organization should take. What she is expecting in this case is a summary of the keynote and your personal interpretation/analysis based on your own existing knowledge and experience. Perhaps she is also testing you to get a sense of how much you already know about the subject.
# Back-to-Office Report

[YOUR NAME HERE] – [Date submitted]

## Part 1 – Event Summary

<table>
<thead>
<tr>
<th>Event Name:</th>
<th>Location and Date:</th>
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</thead>
<tbody>
<tr>
<td>KMWorld 2017 – Keynote address by John Seely Brown</td>
<td>Washington, DC., November 6-9, 2017</td>
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</table>

### Event Background:

[With some background research, provide a brief description of this event. Who is the target audience? What is its focus?]

### Keynote Speaker:

[With some background research, provide some context for the keynote in terms of the author’s background. Why should we pay attention to what he has to say? How did he get to be the keynote speaker?]

### Key message(s):

[What was the one key message or top 2-3 messages the speaker delivered? [Fill the space below with clear paragraphs].]
Part 2 – Personal Reflections

A. Your Reaction to the Talk
[the questions below are not meant as individual prompts that all need to be answered, just
suggestions for reflecting on the speech]
• What peaked your interest?
• What surprised you?
• What was confusing or unclear to you?
• How does it relate to your existing knowledge of the field (KM)?
• How does it relate (if at all) to your work experience?

B. Follow up
• Identify 2-3 resources that were either mentioned in the talk or related to the talk that you would
  be interested in learning more about?
• Based on this speech, what are 3 things you would like to learn more about [in the context of this
  class]? These can be phrased as questions.
Appendix B– KM Group Project

This group project is the backbone of the KM course and is the major component of the submitted work for this course.

The object of this action-learning project is threefold:

1) To help you learn about knowledge management in practice. What is it? What does it take for organizations to ‘do’ it? How well do they do it? Do they realize they need to do it? What gets in the way of their doing it? What would it take to do it more effectively? Think of the project as a means of learning to practice dialogical OD.

2) To help an organization (i.e. a group of people who work to accomplish something together) share knowledge more effectively. You will advise them on the importance of sharing knowledge and to offer guidelines for how they can do so more effectively, improving their ability to share knowledge.

3) To provide a context for group members to share knowledge in practice within the group. One of your tasks is to reflect on how and how well you do this throughout the semester.

Groups and Client Organizations

You will organize into groups of no fewer than five and, to make the groups manageable, not more than seven (could be three groups of 7 or three groups 5 and one group of 6).

You may do the projects in organizations where one of the group members works (with that person serving as the liaison) but it is practical to choose an organization that someone knows about, that would like some help, and that might benefit from the work that the group will do: for example, a community-based organization, or some other non-profit.

It is important that you get started on the projects right away at the beginning of that semester. By session 2 (September 21st), you should have approval from an organization in which you’ll do your project and have begun to map out the scope of the project. You will then have five or six weeks to collect the data and do the preliminary analysis.

After this you will have three or four weeks to finish putting together your ideas and findings and complete your write-up before the presentation in December.

The important consideration is that you limit the scope of your assignment to what you can manage in say a total of 8 weeks (and therefore about 180 to 200 hours of combined time if it is group of six or seven). This is enough time to do something interesting but not enough time to do something very ambitious.

The person who is your ‘gateway’ to the organization must appreciate that the primary reason why you are doing the work is to complete a group project/assignment for the KM course.

It must be a project that you (not the organization) own as a group. While it will make a contribution to the organization – it will certainly prove to be useful to them – when you are talking to anyone in an
organization you need to be clear that it is first and foremost a Master’s program project. Although they may identify a problem area for you to focus on, you will give them a proposal in which you outline the scope and intended outcomes of your work and you will do the work provided they accept this. You must also consult with the instructor to get approval on a final Scope of Work.

If you need an online space to discuss possible organizations and form groups, I’ll add a space to the Blackboard site for this purpose. However, it is best for each group to determine how they will collaborate and which tools they will use to do so. The Blackboard site is one option.

Think of the project as mini-consulting activity with a narrow scope that you will define, common steps for each group, three time-sensitive group deliverables and two individual deliverables.

**Common Steps**

- **Step 1**: Identify an organization suitable for the project’s purpose (with support from the Professor and Director of the program) and write a Group constitution (Group Deliverable #1a, due September 21);
- **Step 2**: Work with the organization/client to scope the project and intended outputs by developing a consulting assignment Scope of Work (Group Deliverable #1b, due September 21) – make sure to consult with the faculty before finalizing the Scope of Work;
- **Step 3**: Collect data through interviews, focus groups, surveys or other appropriate methods as described in the Scope of Work;
- **Step 4**: Analyze the data and draft preliminary recommendations (Group Deliverable #2, due November 9);
- **Step 5**: Present and submit the final presentation in class and to the client (Group Deliverable #3, Due December 6).

**Group Deliverables**

**Deliverables 1a and 1b: Group Constitution and Scope of Work**

The Group Constitution is meant for the group members (shared with the instructor) while the Scope of Work is the agreement made with the client organization (and the instructor). While the Scope of Work spells out WHAT you intend to accomplish by WHEN and HOW you will accomplish that work in terms of specific data collection methods and analysis, the Group Constitutions I about how you will work together as a team.

**Group Constitution**

By Session 2 (September 21), each project group will submit a ‘constitution’ for the group, outlining how the group intend to work together. A constitution is a statement of principles, values and practices that each member of the group intends to follow and uphold. You can frame this any way you choose and it can be as long as short as you wish to make it, but it is important to draw it up collaboratively.

You might outline your expectations for meetings, including when (and where) you will meet, what you expect in terms of attendance and participation, how long you will meet for, and how you will organize the meetings – including such considerations as leadership and facilitation.
How are you going to organize your work? Do you expect each member to outline his or her commitments and will you, as a group, review the status of your work at meetings? You should also think about whether you expect to hold individuals to account for their commitments to the group’s work. If so, how will you do this? If you are going to use an online tool (such as SharePoint or Google Docs) for organizing and for sharing information, what are your expectations about people’s online contributions? Is someone going to be a facilitator (organizer?) of the online work? Your constitution might include a statement about what you expect to gain from the project, what kind of ‘space’ you want to create and hold for your work together (encouraging debate, experimentation, sticking to an agenda and time frame.....?)

The Constitution MUST include some wording about seeking help/advice/guidance from the instructor when appropriate.

Scope of Work (1b)
For this project, your general task is to observe how people share knowledge at work, identify what’s working well, what’s not working well (where there are barriers to knowledge sharing), and develop recommendations for improvements. However, you will need to define a more narrow, realistic and manageable Scope of Work to be developed in collaboration with the client organization.

You might be asking them: What knowledge do they need to share to get things done? What knowledge do they actually share and what don’t they share? (Perhaps they share ‘technical information’ but don’t talk about how committed individuals are to the work.) How do they share knowledge and when and where do they do so? (Do they have productive meetings where they share knowledge freely?) Who participates in the process of sharing knowledge? Are some people who should participate excluded?

Assess what tools are used to capture and manage knowledge. Are those tools effective? How do people collaborate? Do the tools help or hinder collaboration?

As you start engaging with your client organization, you will need to narrow down the scope of what you are asking and identify a focus based on 1) how you are understanding the client’s context; and 2) how the client is talking about their knowledge-related challenges.

Make sure that you have adequate data collection protocols in place and that you address confidentiality issues upfront with your client organization.

The Scope of Work should include information about the following:

- Who you are reporting to in the organization and their role in the organization (as appropriate)?
- A common understanding of the problem/challenge/question to be addressed (common in the sense that it has been discussed and agreed upon with the client organization);
- A plan of action for data collection (subject to change) and analysis and a timeline that parallels the class deliverable requirements;
- A description of the final deliverable to the client.

** If some of the details have not been finalized, a draft MUST be submitted for partial credit by the established deadline and a final version will be due within a week for additional credit. **

Evaluation for Deliverables 1a and 1b
• Timeliness (delivered on time) and professionalism of the deliverables (presentation, readability, free of typos and grammatical errors);
• Completeness of deliverables (all key requirements are addressed);
• Demonstrates a thorough understanding of the work to be accomplished to successfully complete the project;

**Deliverable #2**

This deliverable will be flexible in terms of format and content. It should consist of a 5-7 page brief highlighting the following:

1. Progress so far in collecting data from stakeholders in the organization and in conducting early analysis of the data with tentative recommendations;
2. A plan of action for successfully bringing the project to completion (identifying remaining challenges to be addressed).

It is a checkpoint to ensure that the group is staying on target with regards to the scope of the consulting assignment and on schedule to deliver final recommendations by the December 6th deadline.

**Evaluation Criteria for Deliverable #2**

- Timeliness (delivered on time) and professionalism of the deliverable (presentation, readability, free of typos and grammatical errors);
- Provides sufficient data and information to make a determination about whether the project is on track and expected to successfully reach completion by the deadline.

**Deliverable #3 - Report to the Client and In-Class Presentation**

You should negotiate with the client during early discussions about the scope of work for the assignment what final deliverable they will expect from you and what would be most useful to them. They may want a 5-page summary of findings. They may ask you to present your findings and recommendations in a face-to-face meeting with their staff. Make sure you have agreement on what your final product for the client will be and that they are clear about your timeline for completion of the project.

**For class purposes**, your final presentation to the class is your final deliverable. Therefore, it must be comprehensive. Assuming 4 groups, each group will have a full hour. Anticipate spending 30 minutes on the presentation, and 15 minutes for Q&A. The extra 15 minutes will be used as needed for buffer between the different groups and short breaks. If you are doing a presentation for your client, you may reuse sections of it for class purposes, but you will need to adjust it to the audience (your classmates) AND you will need to add a section addressing what you have learned about knowledge sharing within the group.

Assuming you will be using a set of slides or some other visual materials, please send a courtesy copy to the instructor 24 hours prior to the live presentation.

**Recommended structure for the final in-class presentation:**

- Who: The Client (introduce the client organization)
- What: The Task (Scope of Work / Definition of the issue to address)
- How: Methodology (data collection approach and method of analysis)
• Findings / Data
• Recommendations to the client
• What have we learned (as a group)

Evaluation Criteria for the presentation

• Logical flow in the presentation of information and transitions between presenters (all team members should contribute to the presentation in a meaningful way);
• Adequacy of data collection methods, data collection implementation and analysis (did the presentation address any weaknesses or gaps in the data collection and/or analysis?);
• Overall professionalism of the presentation (oral presentation skills, content of slides or other presentation materials, no typos or other distracting elements);

Strength of recommendations: Do the recommendations flow logically from the data? Are they realistic and written in such a way that the organization can implement them?

Individual Deliverables Related to the Group Project:

Personal Reflections/Journal (focused on the group project)
The journal entries should address the following questions from your individual perspective as a team member in the group project: 1) What is working well? What is not working well? What could I (and “we” as a group) do differently moving forward? Think in terms of collaboration, knowledge sharing, basic communications, tools, team dynamics, meetings, roles, interactions with the client, aha! moments, etc. This is meant as an individual Pause and Learn (PaL).

The final journal entry due after the final presentation, should provide a recap of the entire semester’s group work experience, which should not be too hard if you have kept a detailed journal up to that point and you should be able to address how your own thoughts about the group have evolved over the semester.

Evaluation Criteria:

• Sessions 2 through 5 (1 point each) + final wrap up entry (6 points) = 10 points
• Demonstrates individual learning within the context of the group
• Professional writing, clearly articulated thoughts, free of typos and grammatical errors

Peer Assessment: Grading group members’ contributions to the KM project
You must submit confidential grades on the contributions of each group member (including your own) to your project. A template is included in this document and it will be posted in a more editable format on the Blackboard site.
Appendix C. Recommended Books


** Special Interest: The Future of Organizations **


** Special Interest: Storytelling **


** Textbook style **


** Practitioner perspective **


** Textbook style, very comprehensive ** - talk to the faculty before selecting this for the Book Review and Critique.


** Classic **


** Special interest: KM Methods/Storytelling ** Steve Denning was a key figure in the World Bank’s early focus on KM in the late 1990s.


** Classic **


** Special Interest: Team and Organizational learning **


** Practitioner Perspective **
**Practitioner Perspective, this one is a keeper you will want to have on your bookshelf**

**Highly recommended as a recent collection of works by practitioners and thought leaders and **FREE** **for download. Two chapters are assigned as readings for session 1.**

**Special Interest: Organizing Knowledge**

**Special Interest: KM Methods**

**Special Interest: KM Methods**


**Classic, but you can get the main points by reading one of the HBR articles**


**Special Interest: Collaboration tools**

**Practitioner Perspective**

**Practitioner Perspective**

**Classic - Worth reading a summarized version**

O’Dell, C. & Grayson, J. (2012). *If Only We Knew What We Know: The Transfer of Internal Knowledge and Best Practice*. Free press.
**Classic**


Wenger, E., McDermott, R, and Snyder, W. M. *Cultivating Communities of Practice*