

FISR2

STRUCTURAL REFORMS BETTER INTEGRATED
WITHIN FISCAL FRAMEWORKS

Experiential Knowledge Capture

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CEF

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Why Organizational Capacity Development for Knowledge Capturing and Sharing?

Our knowledge stays within our heads, not captured and shared across the organization

01

Increase effectiveness of service delivery

Develop a knowledge-sharing culture and better collaboration across silos

When key staff members leave, we risk losing important know-how

02

Increase sustainability of service delivery

Build institutional memory to ensure continuity of high-quality services

We are not documenting and replicating successful solutions – or learning from failures

03

Replication and scale-up of what works

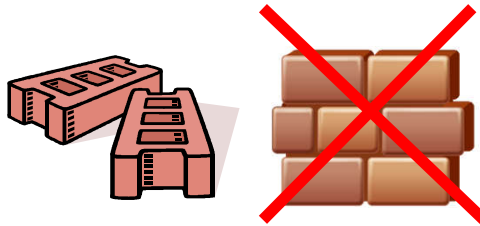
Build on successes, avoid mistakes, to improve livelihoods and shared prosperity

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Information Vs. Knowledge

An accumulation of bricks
is not a wall!



An accumulation of information is
not knowledge!



Source: OKS Certificate program World Bank



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Information Vs. Knowledge

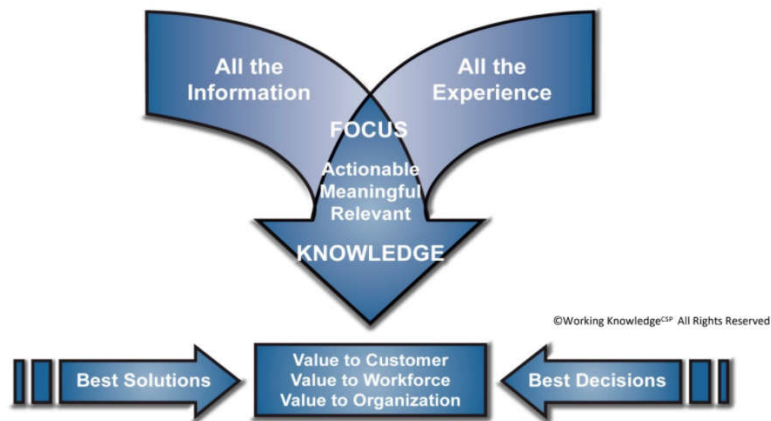


Source: OKS Certificate program World Bank

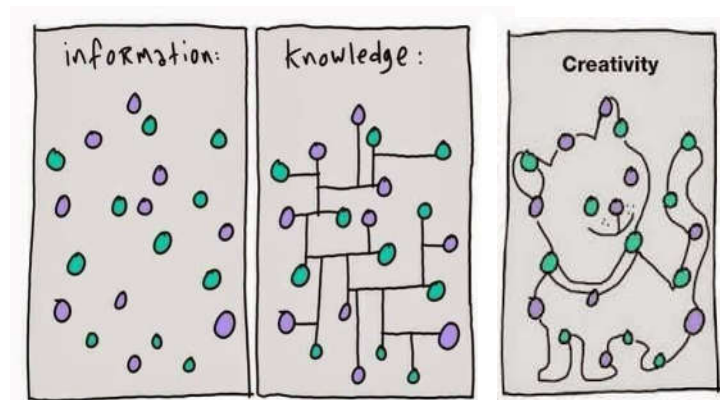


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One View of Knowledge



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Experiential Versus Explicit Knowledge

Capturing your experiences and
that of your peers

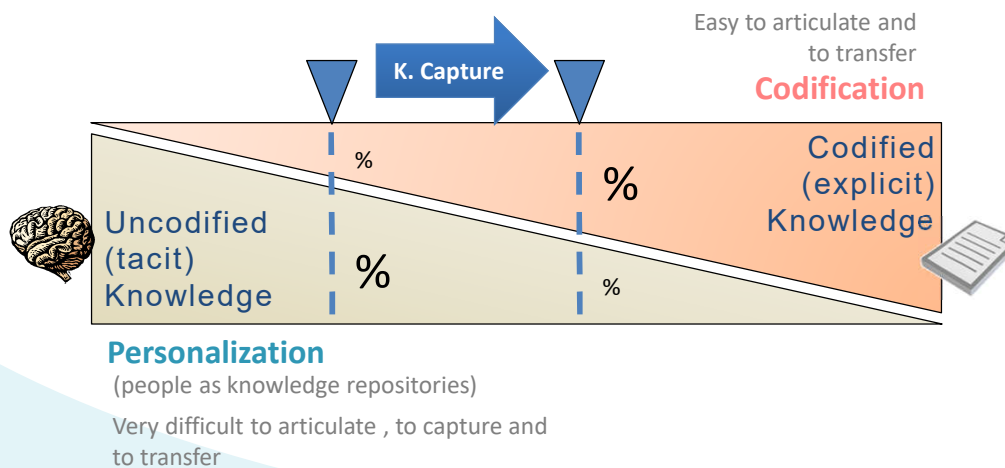
VS

Capturing knowledge that has already
been recorded



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Experiential Knowledge Continuum

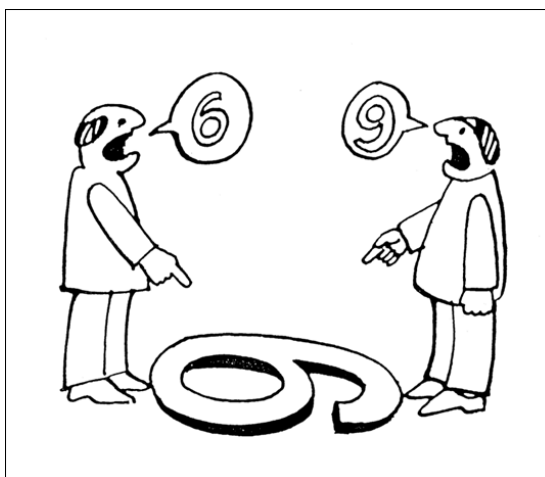


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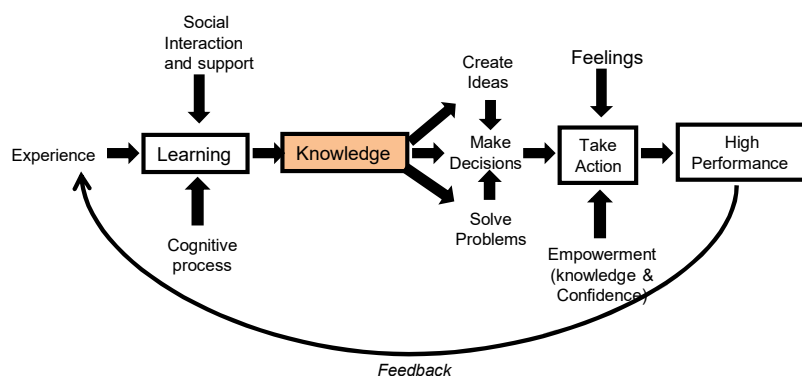
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Knowledge is:

- Context sensitive
- Situation dependent

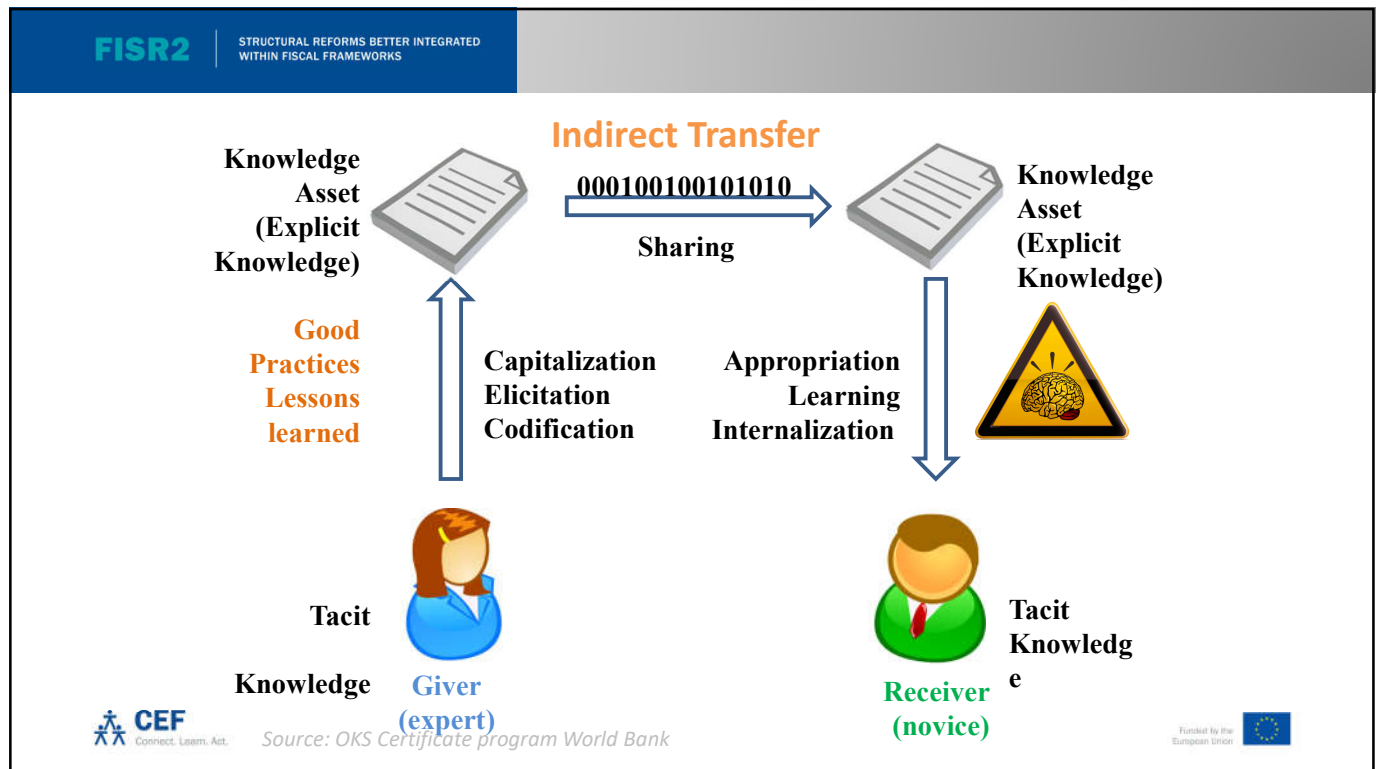


The Learning-Knowledge Loop

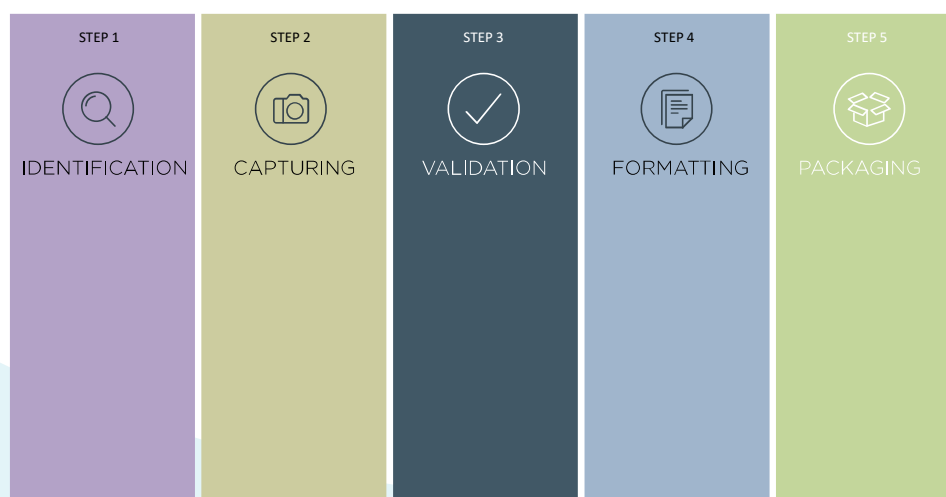




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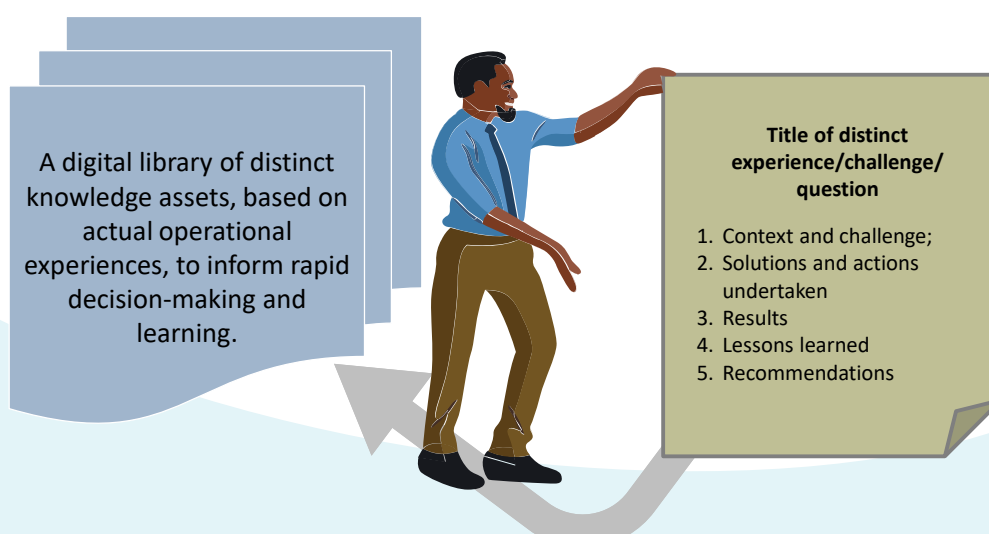
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A Step-by-step Process for Systematic Capturing of
Operational Experiences and Lessons Learned

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What would be the final outcome of a comprehensive capturing approach to *Organization* and its partners?



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Definition

STRUCTURAL REFORMS BETTER INTEGRATED
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Knowledge Asset A digital document or collection of media containing compiled, structured and validated guidance (knowledge) on a specific question or challenge.



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A Step-by-step Process for Systematic Capturing of Operational Experiences and Lessons Learned


STRUCTURAL REFORMS BETTER INTEGRATED
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STEP 1




IDENTIFICATION

STEP 2




CAPTURING

STEP 3



VALIDATION

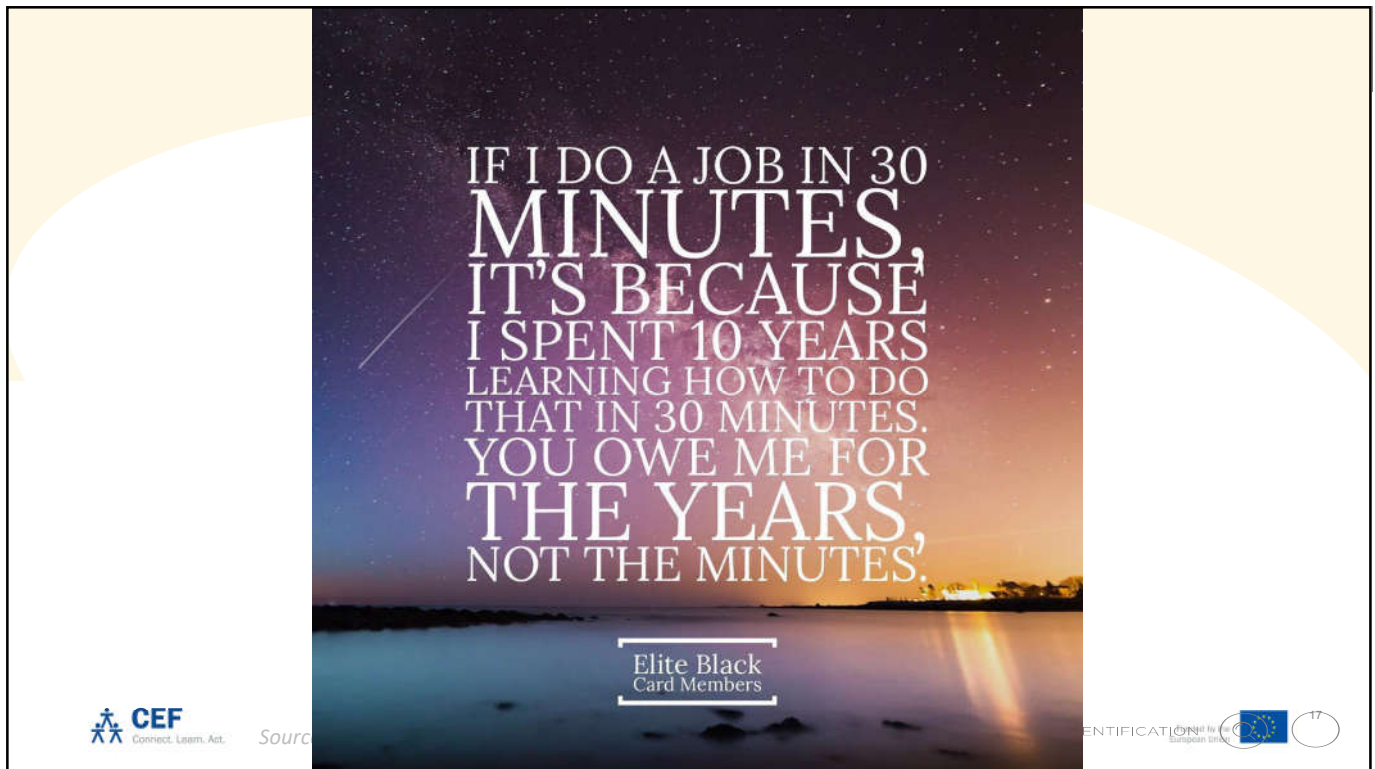
STEP 4



FORMATTING

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Capturing Criteria

- ✓ RELEVANT - DEMAND?
- ✓ FOCUSED - WELL DEFINED?
- ✓ SHAREABLE?
- ✓ EASY TO CAPTURE?
- ✓ EASY TO VALIDATE?
- ✓ AT RISK OF BEING LOST?

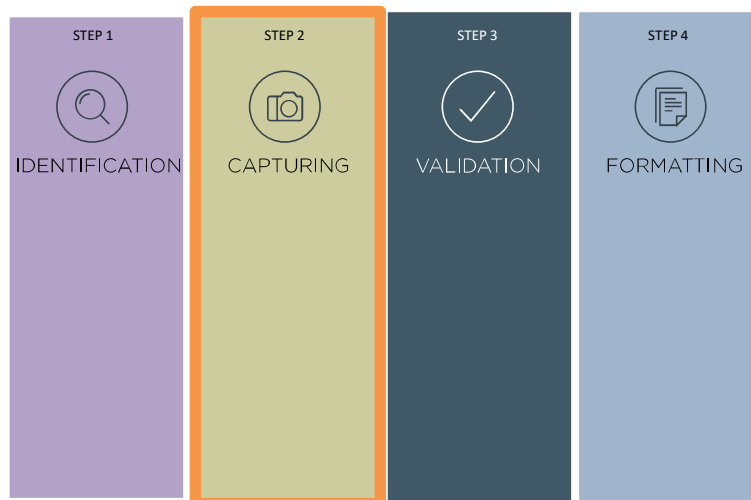
CEF Connect. Learn. Act. Source: OKS Certificate program World Bank

IDENTIFICATION European Union 18

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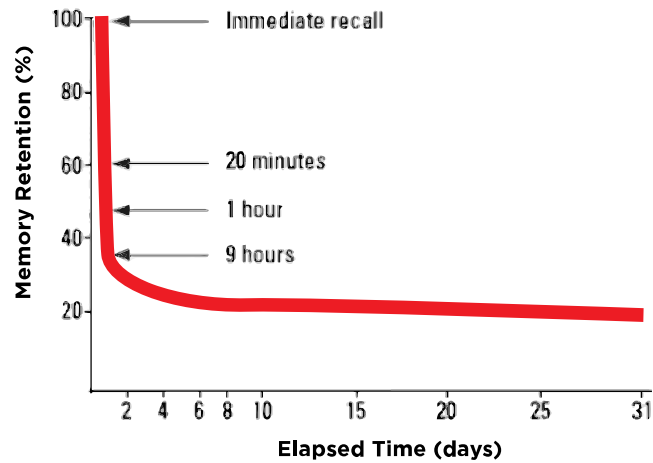
Choice of Knowledge Asset/Solution Topic

- What specific problem are you trying to solve?
- How is your Knowledge asset/solution uniquely responding to this problem?

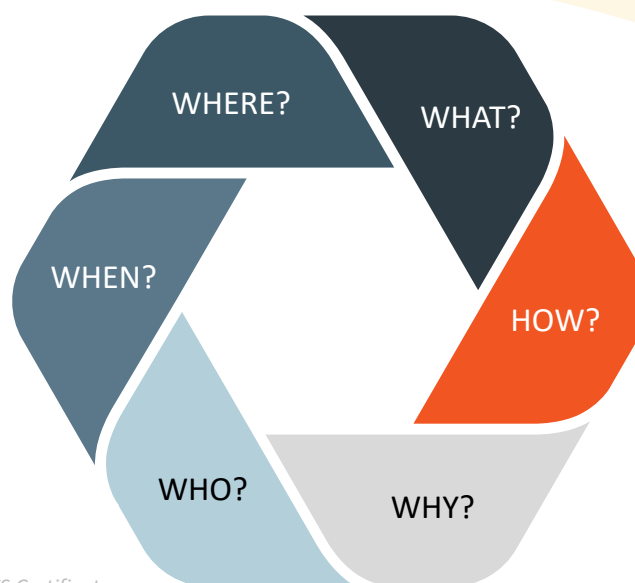


When to capture?


The Forgetting Curve



Identification tools: 5W1H questions



Capturing Activities



Individual capturing activities	Collaborative capturing activities
Interview	Focus group
Storytelling	After Action Review (AAR)
Back-to-office report	How-to-guide
Observation	Wiki
Blog	Frequently Asked Questions (FAQs)
Recording activities during performance (audio/Video/VR/AR/ Metaverse)	Collaborative workspaces
Social network Analysis (SNA)	Enterprise Social Networks
Job Shadowing / Mentoring / Tutoring	Webinar
	Online Forum
	Community of Practice (CoP)
	Ask me anything
	Peer Assists
	Premortem review

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Activity or Resource	Users		Dynamics		Adoption and Operation			ICT		Preparation		Supported Media			
	Individual	Group	Simple events/actions	Continuous process	Easy	Moderate	Difficult	Requires ICT support	Short set-up time	Long set-up time		Text	Audio	Images	Video
After-action Review		●	●	○	●				●			●		●	○
Back-to-office Report	●		●		●				●			●		●	○
Blog	●	○		●		●		●		●		●		●	
Collaborative Workspace		●		●			●	●		●		●	●	●	●
Community of Practice		●		●			●	●		●		●	●	●	●
Focus Group		●	●			●				●		●	○		○
Online Forum		●		●		●		●		●		●			
Interview	●	○	●		●				●			●	●		●
Observation	○		●	○	●				●			○	●	●	●
Premortem Review		●	●	○	●				●						
Storytelling	●		●	○	●				●			●	●		
Wiki	●	●		●			●	●		●		●	●	●	●

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Planning towards a “Knowledge Asset”

Plan your narrative:

Facts

Interpretation

Title of distinct experience/challenge/ question

1. Context and challenge
2. Solutions and actions undertaken
3. Results
4. Lessons learned
5. Recommendations

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Word Template

Sector: [Add Sector, e.g. DRM] Sub-Sector: [Sub-sector, e.g. Resettlement, evacuation] Target Audience: [add key audiences e.g. Decision-maker, sector practitioner] Keywords: [add major tags for findability] Contact: [add author/main contact person/department in charge]	[Title] [Add an executive summary which briefly summarizes: - Context/Challenge - Recommendation/Lesson Learned]
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Context and Challenge

- [Give context and provide a brief summary the key question/challenge.]

Response and Actions

- [Briefly describe the type of solutions and actions that were undertaken to overcome the problem or challenge? Who undertook action? Try to visualize concepts if possible or add images where useful.]

Outcomes and Results

- [Describe the key outcome that resulted because of the response/action.]

Lessons Learned

- [Add here the key takeaways and lesson learned from your particular experience. What should be remembered? What would you make different and why?]

Recommendations

- [What would you convey to a peer to take into consideration when facing a similar challenge? What not? How can problems like this in the future be avoided? How can responses be improved?]

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Example of Knowledge Asset

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Sector: Economic growth and social development

Sub-Sector: Economic growth and social development

Target Audience: All parties involved in writing the ERP

Keywords: ERP, Structural Reforms, Selection, Teams,



Contact: Janez Šušteršič
sustersic.janez@gmail.com

How to select Structural Reform measures for a coherent and well thought ERP document?

Executive Summary:

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WHAT	WHO participates	WHO leads	WHEN	Key document or output	PURPOSE / DECISION WHY	Collaborative feedback points	Decision-making points
High-level dialogue with EC	PM, ministers, EC, ERPC Admin	ERPC	Mid May	e-mail letters	Raising awareness and role of ERP and SRs		
ERP working group formation & meeting	ERPC, PMO, LMs, MoF, relevant agencies		Mid May	Minutes of meeting?	First draft of SRs		Decision by XX on the membership of the working group
ERP guidance note submission & ERP launch	EC, ERPC		Mid June		Determination of "rules" for ERP cycle		
ERP guidance note translation	ERPC Admin		Mid June		Enabling of wider acceptance and understanding		
ERP guidance note distribution to working group(s)	ERPC to PMO, LMs, MoF, relevant agencies	Name	End June / Mid July		Determination of "rules" for ERP cycle		
Internal ERP launch – first official meeting	ERPC, PMO, LMs, MoF, relevant agencies	Name	Early August		Determination of ERP preparation rules, platforms, document flow; SRs selection and prioritization	What feedback do we want to collect from participants?	


 Source: *ERP coordination plan template (CEF)*


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Context and Challenge

[Give context and provide a brief summary the key question/challenge.]

- One of the first steps of the ERP process is the Internal ERP launch (first official meeting).
- During this event, Structural Reform measures shall be selected and prioritized through discussion and coordination among all parties involved.
- The selected measures need to be clear and make sense to all parties so they can feel a sense of ownership and they stand behind them so such measures can be implemented.
- Unfortunately, for many reasons, this selection and coordination process is not always conducted in a way that will lead to a final well defined, coherent, and well thought ERP document.

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Response and Actions

[Briefly describe the type of solutions and actions that were undertaken to overcome the problem or challenge? Who undertook action? Try to visualize concepts if possible or add images where useful.]

- Two approaches can help addressing this challenge:
 1. Establish a good and open communication and relationship among the various parties that will write the selected measures (Operational level) (Addressed in this Knowledge asset)
 2. but also at the top level, among the ERP coordinator and the (prime) Minister/Ministries/Cabinet. This is sometimes a challenge since some governments are sometimes “not fully aligned”, for example, for new or coalition governments. (Not addressed in this Knowledge asset)



Source: OKS Certificate program World Bank



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- In order to create such environment of open communication and trust, here are some recommendations:
 1. Operational team members need to meet frequently and talk to each other.
 2. Various parties/members need to communicate as colleagues/team members and not as “dominating/controlling” superiors.
 3. Informal channels of communication need to be established, where people are encouraged to stop by each other’s office whenever they need to informally discuss any aspect/issue.
 4. Open and honest communication exchanges must happen to find solutions to problems (no need to hide problems or wait for something to miraculously happen).
 5. Don’t just wait for official ERP meetings to meet with other parties, create many informal short meetings !! along the journey.
 6. Reduce fear and apprehension of new comers. In order to do so:
 - Make participants realize that they are part of a TEAM and that consequently they will get support from other team members, including members with previous experiences and support from CEF (Ljubljana).
 - Make them understand that there is no need to start from a blank sheet of paper, they have access to (ERP or not) documents that can help them get the information/guidance they need.
 - Make them realize that it is OK if the end-result is not technically “perfect” or doesn’t exactly follow the guidance as long as the end result is convincing, clear, well thought and coherent.



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Outcomes and Results

[Describe the key outcome that resulted because of the response/action.]

- By creating such open and safe environment from the beginning of the ERP process, it is more likely that its output, the ERP document, will include structural reform measures that are coherent and well thought and that will be fully supported by the different parties, who have created them, for their future successful implementation.

Lessons Learned

[Add here the key takeaways and lesson learned from your particular experience. What should be remembered? What would you make different and why?]

- Build trust and strong ties between all parties as soon as possible, so everyone feels being part of ONE team (Team Psychological Safety).
- Create many informal opportunities for people to meet in the work context and/or outside (retreats)
- Make all parties realize that writing the ERP is not an impossible/complex/dreadful task and that the outcome will not be something they don't want to do. They should not fear and apprehend so much about it.
- Use facilitators to make big ERP meetings more effective and more engaging and so everyone is given the opportunity to ask questions, to share ideas and suggestions.

Annex: [If applicable, add Annex with additional information, terminology etc.]

References

- **Challenges in Positioning of ERP Republic of Kosovo**
https://www.cef-see.org/mnt/webdata/static/fisr/2020_Challenges%20in%20Positioning%20of%20ERP_Kosovo.pdf
- **Prioritization of ERP structural reforms Process, responsibilities and methods**
https://www.cef-see.org/mnt/webdata/static/fisr/2021_Webinar2%20Presentation%203_Jelena%20Rancic_Final.pdf



Source: OKS Certificate program World Bank



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Sector: Economic growth and social development

Sub-Sector: Economic growth and social development

Target Audience: All parties involved in writing the ERP

Keywords: ERP, Structural Reforms, Selection, Teams,

Contact: Janez Šušteršič
sustersic.janez@gmail.com

How to select Structural Reform measures for a coherent and well thought ERP document?

Executive Summary:

Collaboratively developing the ERP can be an intimidating and challenging process. In order to produce a coherent and well thought ERP document, the multidisciplinary teams involved need to openly share and communicate with each others. Reducing the level of formality of these interactions and increasing their frequency may help creating more engagement from participants and producing better results. This good practice describes some approaches that can help achieve these goals.



Source: OKS Certificate program World Bank



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Activity #1

Selecting an Experience: What would YOU like to share?

What past personal experiences have you gained from working on the ERP (that has not yet been codified) that you think will be valuable for others to learn from?

How to?

In your team, select at least 5 potential topics for knowledge asset creation



Source: OKS Certificate program World Bank



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TEAM 1

Experiential Knowledge Topics for Knowledge Asset?

1. How to?
2. How to ... ?
3. How to ... ?
4. How to ... ?
5. How to ... ?

Expert Name:

What past personal experiences have you gained from working on the ERP (that has not yet been codified) that you think will be valuable for others to learn from?

Remember asking yourself the following questions: Is there a demand for it? Is it focused enough? Is it potentially at risk (of being lost)?



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Activity #2

Preparing for the Expert Interview

What questions will you ask the expert to collect his/her own expertise in order to populate the Knowledge Asset template?



Source: OKS Certificate program World Bank



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Capturing and Sharing Good Practices in Preparing the ERP

February 6 – 27, 2023

Team project instructions

Please follow the below instructions to prepare team projects for this event.

Why? The team project will help you better understand the importance of capturing lessons learned for your work. You will practice identification and capturing of experiential knowledge on ERP.

Who? All participants of this event are invited to participate in team projects. It is a requirement to receive the certificate on the completion of this online course.



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Team project

Interview the expert and fill out the knowledge asset template (Word Document).



**Title of distinct
experience/challenge/
question**

1. Context and challenge;
2. Solutions and actions undertaken
3. Results
4. Lessons learned
5. Recommendations