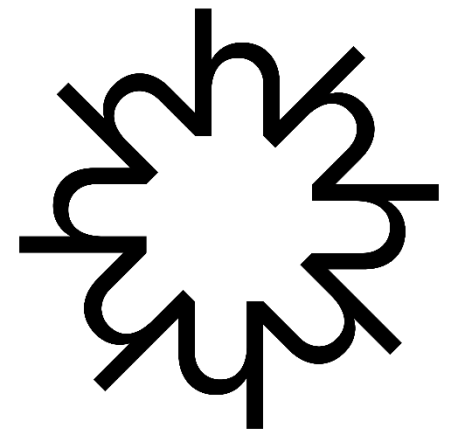


Learning & Sharing Guide *Part 3*



Integrating Knowledge Management
and Organisational Learning in Small to
Mid-Sized Civil Society Organisations

horizont3000

A COMPACT AND PRACTICAL GUIDE FOR GETTING STARTED

VERSION 1.0 – 2026



horizont3000 team at the 2025 Annual General Meeting in Mozambique

ABOUT THIS DOCUMENT

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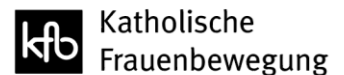
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Introduction to the Guide

The Learning & Sharing Guide consists of **three volumes**.

This present third volume supports more efficient, consistent and effective work processes at small to mid-sized organisations by starting to apply two core concepts: Knowledge Management (KM) and Organisational Learning (OL).

In a small to mid-sized civil society organisation like ours, we face familiar challenges: frequent staff changes, project-based funding structures, and essential knowledge distributed across individuals or hard-to-find folders. When colleagues leave, it often feels like we're reinventing the wheel.

The volume outlines in a practical way how to establish shared, reliable systems for capturing and using organisational knowledge – creating a collective “team brain” that enables us to learn from both successful and less successful experiences. It offers step-by-step guidance for getting started, whether you have formal management approval or are beginning with a good idea and the right motivation.

The first volume provides some background information on KM, OL, and learning & sharing at h3, as well as definitions and theoretical frameworks for the main terminology linked to and commonly used at h3.

The second volume is intended to serve as a practical resource for all those involved in planning, organising, coordinating or offering learning & sharing activities, where they can find all relevant information. Most of the content you will also find as interactive pages at the h3 Knowledge Hub.

As we continue further developing and learning, we will update the guides. You will find most recent versions of all guides on the h3 Knowledge Hub (please contact us, if you need access).

These guides are the result of more than 15 years of experience at horizont3000 (h3) in developing and implementing activities with a variety of partners to foster practice-based knowledge sharing and learning. Many colleagues from different offices and departments have participated in advancing KM at horizont3000, along with partners around the world. They all have contributed to the pool of information, tools and methods bundled in these guides.

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1. Introduction: Types of Knowledge

Understanding Knowledge Management (KM)

Knowledge Management is a systematic way to **identify, create, share, and use** knowledge. It's not just about reports and databases, or *explicit* knowledge. The most valuable knowledge is often *implicit* or *human* knowledge – the insights, experiences, and lessons learned. KM is about tapping into all of it.

Info Box The 3 Types of Knowledge

- **Human Knowledge (Implicit):** The "know-how" in people's heads. Your experience running community workshops, your relationship with a key local partner, your ability to sense when a project is off track.
- **Structural Knowledge (Explicit):** The "know-what" that is written down or captured in a structured way. Project proposals, final reports, budgets, checklists, podcasts, videos, contact lists, process manuals.
- **External Knowledge:** The "know-who" outside our walls. What are other CSOs learning? What are donor priorities? Who are the experts we can call for advice?

Understanding Organisational Learning (OL)

Organisational Learning is the *result* of good KM. It's what happens when we, as a team, actually *use* that knowledge to adapt and get better. It's the shift from "That's how we've always done it" to "Last time, we learned X, so this time, we're going to try Y".

Example Box KM & OL in Action

- **Without KM/OL:** A PM finishes a 3-year project and leaves. Their final report is saved on a shared drive as "Final_Report_v5_FINAL.pdf". A year later, you start a similar project. You can't find the report and end up making the same mistakes the first PM did. *Knowledge was stored, but not shared or used.*
- **With KM/OL:** The PM finishes the project. As part of their offboarding, they do a 30-minute "lessons learned" debrief (a KM process). The key finding – "Partner A is fantastic, but only if you hold weekly check-ins" – is saved in a simple, central "Project Insights" document (a KM tool). When you start your project, your onboarding checklist points you to this document. You read the insight and build weekly check-ins into your plan from Day 1. *Knowledge was captured, shared, and used to improve.*

2. Context: Organisational Size Makes a Difference

A KM system for a 500-person organisation requires other aspects and tools as KM for a 15-person team.

Small organisations (<100 staff) have:

- Informal structures and direct communication.
- Knowledge stored in people's heads (which is risky!).
- No dedicated KM staff – it's part of everyone's job.

The goal is not to build a complex system, but to create simple, lightweight *habits* that connect the people who *have* knowledge with the people who *need* it. The “KM tools” of small organisations can be:

- A 30-minute chat by the coffee machine.
- A well-organised shared drive.
- A monthly "Show & Tell" team meeting.
- A simple onboarding checklist.

Medium organisations (100-500 staff) have:

- Formal, structured tools (databases, hubs).
- Dedicated KM managers or teams.
- Standardised operational procedures.

Medium organisations employ a mix of formal and informal structures. They can have some degree of centralisation and standardised operational procedures but still maintain flexible communication channels.

3. Getting Started: Two Paths Towards Implementation

The "Official Way"

This is the top-down approach. It happens when top management is already convinced and provides a clear mandate and resources (time and budget).

The process looks like a standard project:

Sensibilisation: Leadership raises awareness and forms a small KM team.

1. **Assessment:** The team conducts a formal "Knowledge Audit" (more on this in Section 5).
2. **Strategy:** A formal KM plan is developed based on the audit.
3. **Implementation:** The plan is rolled out, evaluated, and adjusted.

The "Guerrilla Way"

This is the bottom-up approach. It starts with one or two motivated people (like you!) who see a problem and start fixing it, even without an official budget or permission.

This path is flexible, iterative, and results-focused:

1. **Do It:** You and an ally (a "KM Champion") identify one small, highly relevant problem. You don't ask for permission; you just start a small KM activity.
2. **Talk About It:** This is the most important step! You must prove the value of what you did. Collect *success stories* and positive quotes (story listening). You need to show how your small action saved time, reduced frustration, or improved quality. Measure tangible outcomes with *key performance indicators* (KPIs).
3. **Coordinate Activities:** You share your success and find other "KM promoters" in other teams. You coordinate your "guerrilla" activities and start building a small community of practice.
4. **Institutionalize Successes:** After you've collected a portfolio of small wins, you present this evidence to leadership. You don't ask for permission to *start* KM; you show them the *results* you've already achieved and ask for resources to *scale* it.

Example Box A "Guerrilla" KM Action

1. **Do It:** You're a PM (project manager) for Project A. You know the PM for Project B is about to write a big donor report, and you just finished yours. You spend 15 minutes writing a simple "Top 5 Tips for Donor X's Report" checklist and email it to them.
2. **Talk About It:** The other PM emails you back: "Wow, your tip #3 just saved me *hours* of work!" You save that email. You mention this success story in your next team meeting: "Just a reminder, sharing tips can save us real time. It saved [colleague's name] a few hours last week."
3. **Coordinate:** You and the other PM decide to create a shared folder called "Donor Report Examples" and you both drop in your best work. You tell the rest of the team.
4. **Institutionalize:** Six months later, you tell your director: "The PM team started a simple examples folder. We estimate it's cut our proposal-writing time by 10%. We'd like to make it an official policy that all final proposals are saved here."

4. Getting Leadership Support

If you take the guerrilla path, your ultimate goal is to get leadership support. Even if you start with the "official way," you need *sustained* commitment from the top.

To get your management's buy-in, don't talk about "doing KM." Talk about **solving problems**.

Your pitch should be built on three points:

1. **Link to Strategic Goals:** How does this help us achieve our mission?
 - *Instead of:* "I want to start a lessons learned workshop."
 - *Say This:* "Our strategic goal is to 'Increase our impact in Region Y.' A lessons learned workshop after each project will help us apply what we learn *immediately* to the next project, increasing our impact."
2. **Link to Performance (KPIs):** How does this save money or improve quality?
 - *Instead of:* "We should have a better shared drive."
 - *Say This:* "I tracked my time, and I spend 3 hours a month just *looking* for documents. If we take one day to reorganise the drive, we could save the team 50+ hours this year. That's over a week of staff time we get back."
3. **Use Stories:** Stories are more powerful than data.

- **Failure Stories:** "Remember when we lost that big grant last year? It was because the proposal didn't include lessons from a similar project in 2021 – that knowledge left when Dalila did. A simple debriefing process could have prevented that".
- **Success Stories:** Use your "guerrilla" wins. "I shared my reporting checklist with Sara, and it saved her 3 hours. Imagine if we did that systematically?"

Example Box 30-Second Leadership Pitch

"I have an idea that I think can help us achieve our strategic goal of [Org Goal]. I've noticed we waste time reinventing the wheel on [Project Task]. Last week, [Guerrilla Success Story]. I believe if we invest a small amount of time in [Small KM Activity], we can solve this problem and [Save Time / Improve Quality / Reduce Risk]."

5. Assessing The Status Quo: Where Are We Now?

You can't plan a journey until you know where you're starting from. Before you build anything new, you need to understand what knowledge you *need* and what you *already have*.

5.1. What Knowledge Do We Need?

Many organisations jump to buying new software or creating new templates. This is often counterproductive. First, you must ask the most basic question: **What knowledge is essential for our work?**

In your project teams, ask these questions:

- What are our key activities? (e.g., writing grant proposals, conducting needs assessments, M&E reporting)
- To do this well, what knowledge is *essential*?
- What knowledge are we at risk of losing? (e.g., "Our *only* finance expert is retiring," or "Only Neema knows how to use that M&E software")

Example Box A Quick Knowledge Needs Assessment

- **Strategic Goal:** "Expand our services to a new region."
- **Essential Knowledge We Need:**
 - *Relational Knowledge:* Who are the local community leaders and who can tell us about them?
 - *Technical Knowledge:* What are the legal requirements for operating there?
 - *Institutional Knowledge:* What did we learn from our *last* expansion?
- **Identified Gap:** "The PM from the last expansion left, and their debriefing was never documented." This is now your #1 KM priority.

5.2. What Do We *Already Have*?

You probably already have dozens of "knowledge products and services," even if you don't call them that!

- **Knowledge Services:** Team meetings, staff trainings, onboarding for new hires, coffee breaks, project review workshops.
- **Knowledge Products:** Handbooks, checklists, project reports, proposal templates, that "how-to" guide someone wrote three years ago.

The easiest "guerrilla" win is to **improve what you already have**. But you must check if they are *actually useful*.

Info Box The 5-Minute "Is It Useful?" Test

Pick one existing product (e.g., your onboarding plan). Ask a new hire:

- **Is it relevant?** Does it help you do your job?
- **Is it easy to find?** Did you know where it was?
- **Is it easy to understand?** Is it in plain language?
- **Is it a reasonable investment?** Is the time needed to read proportional to the importance of the knowledge gained?
- **Is it up-to-date?** Is the information still correct?

If the answer to any of these is "no," you've found a perfect, easy-win KM project.

5.3. Optional: The "Full" Organisational Assessment

If you have leadership buy-in and resources, you can conduct a holistic KM assessment. This is a more formal process (often a workshop or survey) that looks at the entire organisation.

It covers key areas like:

1. **Roles & Responsibilities:** Who is officially in charge of KM?
2. **Strategy & Culture:** Is KM and learning part of our strategy and organisational culture?
3. **Awareness & Capacity:** Do people feel motivated and skilled to share know-how?
4. **Systems & Tech:** Do our tools (e.g., shared drive) help or hinder?
5. **Institutional Memory:** Do we save knowledge when people leave?
6. **Internal Sharing:** Do teams share with each other?
7. **External Knowledge:** Do we learn from partners and peers?
8. **Learning from Practice:** Do we learn from failure, or just success?

Crucial Foundation: Good KM is impossible without good **Data and Information Management**. Your assessment *must* also check if data is collected, stored, and shared efficiently.

Info Box The KM CAST

A good way to do a full assessment is to use the [KM CAST – Knowledge Management Capacity Self-Assessment Tool](#). Developed by horizont3000, it helps organisations to assess KM in a structured, participatory way.

6. Do We Need a KM Strategy?

The word "strategy" can be intimidating. For a small NGO, you do *not* need a 50-page document. You have other, more practical options. Check the *annex* for more information about each option.

- **Option 1: The Short KM Brief:** A simple 2-4 page document. It states *why* learning is important, *what* our main knowledge areas are, and *who* can help. It's great for building motivation. About 50% of the success of KM comes from *marketing* it within the organisation.
- **Option 2: Integrated Strategy (Recommended):** This is the most efficient approach. You don't create a *new* document. You weave KM & OL directly into your *existing* organisational documents. This makes it part of everyone's job, not an "extra." For example, you could add:
 - in your **HR Policy:** Add "Knowledge Debriefing" to the offboarding checklist
 - in your **Project Management Manual:** Add a step called "Final Lessons Learned Review"
 - in your **Onboarding Plan:** Add "Review Project Insights document".
- **Option 3: Standalone KM Strategy:** This is a big, formal document with its own budget and plan. It's really only for larger, more complex organisations that have a dedicated KM team.

Monitoring & Evaluation: How Do We Know It's Working?

If you are a project manager, you already know this: what gets measured, gets managed. Tracking your KM impact can be very important, especially if you're starting with the guerrilla way.

Don't use "vanity metrics" (e.g., "we created 5 documents"). Use *impact* metrics as KPIs:

- **Time saved:** "Because of the new template, we saved 8 hours on the last proposal".
- **Quality improved:** "Our last 3 project proposals scored higher because we used the 'lessons learned' database".
- **Engagement:** "5 more staff members joined our monthly 'Show & Tell' meeting".

Example Box Your Most Powerful M&E Tool

Start a simple document on your shared drive called "KM Impact Stories".

Any time you hear a colleague say, "Thanks to that checklist..." or "That meeting saved me so much time...", *write it down*. These stories are the "qualitative data" you can use to prove your case to leadership.

7. The KM Action Plan

Whether you have a full strategy or are starting a guerrilla movement, you need a plan – but keep it simple and prioritise.

1. Cluster Activities

Group your ideas into logical "work packages". For example:

- **Institutional Memory:** (e.g., Create onboarding/offboarding debriefing templates).
- **Internal Sharing:** (e.g., Start a monthly "Lessons Learned" lunch).
- **External knowledge** (e.g., Systematic learning from external sources, networks, knowledge partnerships)
- **Systems:** (e.g., Organise the shared drive, set up a "Knowledge Hub").
- **Capacity and awareness:** (e.g., Do a 30-minute training on "how to find stuff", collaborate with your PR/ internal communication team).

A critical first step: Define roles. Even if it's informal, someone needs to be the "champion" for an activity, or chances are it won't get done.

2. Prioritise, Prioritise, Prioritise!

Your assessment will give you a *long* list of great ideas. You cannot do them all. The biggest challenge is deciding what *not* to do.

In your team meeting, discuss and prioritise by asking two questions:

1. **Impact:** Which action will have the *biggest, most visible impact* on our strategic goals?
2. **Feasibility (Quick Wins):** Which action is the *easiest* to implement right now?

Always start with the "High-Impact, High-Feasibility" actions. A quick, visible win builds momentum for everything else.

Example Box Prioritisation in Practice

Your team is debating two priorities:

1. "Buy new, expensive project management software." (High Impact, Low Feasibility)
2. "Create a central, shared calendar for all project deadlines." (Medium Impact, High Feasibility)

Start with #2. It's a "guerrilla" win. It's fast, free, and solves an immediate problem. This will build the trust and buy-in you need to later make the case for the big software purchase.

3. Build Your Action Plan

Use the *same* action planning template you use for your other projects. You don't have to create a new system. Your plan is a roadmap that should be simple, adaptable, and answer the basics.

Here is an example:

Action / Work Package	Responsible (Champion)	Timeframe	Budget (if any)	How We Know It's Done (KPI)
Institutional Memory				
1. Create Onboarding Checklist	You	By End of Q1	0 (4 hours staff time)	Checklist is on shared drive and used for next new hire.
2. Create Offboarding Debrief	HR Lead / You	By End of Q1	0 (3 hours staff time)	Template is created.
Internal Sharing				
1. "Lessons Learned" Lunch	Programme Team (rotating)	3rd Friday of every quartal	€50 / Q (for food)	Meeting happens; at least 1 "impact story" is captured.

Info Box The horizont3000 Learning & Sharing Guide

When it comes to details around budget and necessary timeframes on horizont3000 learning & sharing activities, you can use the [h3 Learning & Sharing Guide](#) and other [KM resources](#) on the h3 Knowledge Hub.

8. References

- **K4DP** – Knowledge for Development Partnership: www.k4dp.org
- **KM-A** – KM network and certification training: www.km-a.net
- Internal: [horizont3000 Knowledge Hub](#) – all resources related to h3's KM
- Internal: [horizont3000 Learning & Sharing Guide](#)
- Internal: [KM-CAST tool](#)

9. Appendices: Selected Methods

9.1 Exit knowledge debrief (60 minutes)

- **Purpose:** Capture critical tacit knowledge when someone leaves
- **Questions:** *What would you tell your successor? Where are the traps? Which documents matter and why? Who are the three key contacts and how to work with them?*
- **Output:** 2–3 pages + links stored in the hub under “Institutional Memory”

9.2 Storytelling for KM (30–45 minutes per story)

- **Content:** Title, 150-word story, “What changed,” one number, a call to action
- **Where to publish:** Intranet, team chat, monthly update

9.3 Story listening workshop (90 minutes)

- **Purpose:** Collect evidence of KM value to convince stakeholders
- **Steps:**
 1. Ask 3 prompts: *What slowed you down? What helped you? What should we keep/stop/start?*
 2. Harvest stories on sticky notes or live form; tag with topic and a simple metric
 3. Synthesize 3 themes + 3 vignettes for leadership
- **Output:** 1-page story sheet with quotes and metrics

9.4 Onboarding knowledge checklist (30 minutes to adapt)

- **Essentials:** Top 10 links, people map, project portfolio map, “How we file things,” glossary
- **Output:** A document or website/hub page; used in day-1 orientation

9.5 After-Action Review (AAR) light (45–60 minutes)

- **Trigger:** Key milestone or project close
- **Questions:** *What did we set out to do? What happened? What worked? What will we do differently next time?*
- **Output:** 1-page AAR note; tag; store in hub; reference in next planning cycle

9.6 Knowledge product review (per asset: 60–90 minutes)

- **Method:** Apply the 5 criteria (Section 5.2) with 2–3 users; fix top 3 issues
- **Output:** Updated asset

9.7 Borrow-an-Advisor / external coaching (several days)

- **Use for:** Setup, assessment, prioritisation, taxonomy, measurement plan
- **Output:** Tailored plan and templates; internal owner trained

Quick Reference Sheet

Launching KM in your department or organisation (official or guerrilla):

1. **Choose one pain to fix** (findability, onboarding, reuse, handover)
2. **Run a light assessment** (needs/gaps + top assets)
3. **Ship two quick wins** (e.g., folder structure + onboarding checklist)
4. **Measure two things** (e.g., find-time, reuse count, onboarding time)
5. **Tell two stories** with one number each
6. **Ask for a small budget** or for top management support
7. **Draft a 2-page KM Brief** with next 90-day plan

Basic artefacts to maintain:

- **KM Brief** (2–4 pages)
- **Asset/document management** (responsible persons, review cycles)
- **Quarterly KPI snapshot** (usage, reuse, time saved)
- **Onboarding & exit-debrief** templates (it may take longer to adjust onboarding processes)
- **Success stories and/or Lessons Learned** (it may take longer to set up stories from scratch)

Role clarity (RACI sample):

- **Responsible (R):** Overall coordination, tracks KPIs, runs comms
- **Accountable (A):** KM Focal, maintain assets & routines
- **Contributors (C):** Review, create, share knowledge
- **Informed (I):** All staff, use the hub, follow standards, share lessons

Exemplary Measure Points:

- Find-time → target **<5 minutes**
- Reuse → **≥1 assets** (documents, templates, ...) **were reused** per project/quarter
- Onboarding → productivity in **≤4 weeks**
- Lessons Learned and/or AARs → **1 per milestone** with at least **1 change implemented**