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Subregional Headquarters for the Caribbean

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Knowledge Management in the Public Sector
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**REPORT OF THE EXPERT GROUP MEETING ON
KNOWLEDGE MANAGEMENT IN THE PUBLIC SECTOR**

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A. DECISIONS AND RECOMMENDATIONS

1. Cost benefit analysis of knowledge management should be done to place a tangible value on information and knowledge. The purpose would be to add to the understanding of policymakers and politicians of the impact knowledge management could hold for the public sector and Caribbean development.
2. The questionnaire created to determine the extent of internal knowledge management (that which is geared towards internal processes) should be reformatted and re-sent to development agencies as it is an important step towards advancing the field within the subregion.
3. A regional framework for knowledge management that can serve development policies and strategies should be drafted and, with the Caribbean Community (CARICOM) Secretariat, presented to the governments of the Caribbean. The framework should be directly linked to sustainable development and put forward a top-down-bottom-up approach to ensure that knowledge management is incorporated across all levels of the public sector.
4. Greater collaboration and linkages with other knowledge management groups and organizations, across sectors must be formed. That would empower them to actively drive knowledge management at a regional level for the Caribbean. CARICOM, the International Development Research Centre and the Commonwealth Secretariat should be partners in those processes.
5. The promotion and establishment of Communities of Practice should be furthered throughout the subregion as an actualization of knowledge management to enhance the public sector.
6. Initiatives such as KM Africa, KM Asia-Pacific and KM Latin America, should be planned and implemented for the subregion, entitled KM Caribbean. The purpose would be to bring the importance of knowledge management for Caribbean development to the forefront.

B. ATTENDANCE AND ORGANIZATION OF WORK

1. Place and date

7. The expert group meeting under the initiative, Knowledge Management in the Public Sector, was convened by the Economic Commission for Latin America (ECLAC) Subregional Headquarters for the Caribbean from 24 to 25 August 2011 in Port of Spain.

2. Attendance

8. A number of experts in the field of knowledge management from member countries of the Caribbean Development and Cooperation Committee attended the meeting.

3. Agenda

1. Welcome, security briefing, introductions
2. Adoption of the agenda
3. Knowledge for action: an introduction to knowledge management

4. Knowledge management in the public sector
5. Knowledge capture and retention
6. Knowledge Sharing
7. Creating an online presence as knowledge management tool
8. Evaluation of Caribbean agency online presence
 - (a) Methodology for measuring online presence
 - (b) Analysis of data
9. Conclusions and recommendations
10. Opportunities for collaboration
11. Closing remarks

C. SUMMARY OF PROCEEDINGS

1. Opening of meeting

9. Welcome and opening remarks were made by Peter Nicholls, Chief, Caribbean Knowledge Management Centre, ECLAC Subregional Headquarters for the Caribbean. He explained the objectives of the meeting, namely, that during the discussions approaches to and practices of knowledge management, specifically the processes of capture and retention and sharing, would be considered. The purpose of those discussions was to determine areas that should be further developed and to identify good practices that could assist government ministries and development agencies to advance economic, social and environmental development across the Caribbean.

2. Adoption of the agenda

10. The provisional agenda was adopted.

3. Knowledge for action: an introduction to knowledge management

11. The first presentation was made, via video-conference, by Octavio Aguirre, Knowledge Management Unit, United Nations Development Programme (UNDP) Regional Centre for Latin America and the Caribbean. The presentation provided an introduction to knowledge management as practiced by UNDP, where it was used to learn from mistakes and improve input. Additionally, it was further used for monitoring and evaluation, specifically with regards to projects, as it allowed UNDP to determine good practices. Knowledge management should form part of management skills used in the management of projects.

12. During the presentation the three gears of knowledge management as defined by UNDP, people, processes and technology, were also discussed. People was highlighted as the most important of those three aspects, but also the most challenging as it required the setting of organizational behaviours that could utilize knowledge management. Two types of knowledge, tacit and explicit, were presented. The

majority of knowledge was not codified and resided in the heads of people, which was known as tacit knowledge, while explicit knowledge was the smaller percentage of codified knowledge. The presentation concluded with a clarification of the knowledge management cycle and the different processes involved, such as creation and capture, processing, sharing and dissemination, and adaptation and use.

13. With regard to issues of security and knowledge management in their work, one participant noted that security management was not possible without proper knowledge management.

4. Knowledge management in the public sector

14. The second presentation provided an introduction to knowledge management and stated that knowledge was a driver for economic success, but was highly dependent on context. It was explained that knowledge management was mainly associated with the private sector, where it was used as leverage to gain profits. In the public sector the focus was different, where the focus fell on leveraging knowledge for the greater good, thus the further development of a country or a region. That suggested that governments should capture, retain and share knowledge and information with itself, its people and other sectors to promote development and achieve greater economic success.

15. The presentation continued with a clarification of possible barriers to the implementation of knowledge management practices in the public sector. The barriers included the bureaucratic and hierarchical nature of the sector, specifically, restrictive policies, guidelines and regulations, frequent government changes and a lack of resources, both human and financial. It was explained that those barriers made the management of knowledge as a resource difficult as it restricted required flows and minimized buy-in and follow through of initiatives. Thus, that sector lagged behind the private sector in the management of knowledge and information. The presentation explained that the geography of the Caribbean necessitated the implementation of knowledge management and that Caribbean solutions should be found to solve the problems with regards to that resource in the subregion.

16. The discussion centred on the barriers experienced in the public sector toward knowledge management initiatives and possibilities for mitigation. Participants said that in the Caribbean there was a resistance to change, both for people and organizations, which led them to hold on to what was familiar and what they had learnt and only to disseminate that information on their own terms.

17. Frequent changes in the public sector and its negative impact on knowledge management initiatives could be mitigated, according to participants, by making it not dependent on a specific government, but linking it to services being delivered and imbedded in all structures; thus, no political affiliations were formed. It was suggested that lessons could be learned from other governments that had successfully employed those measures. It was also said that Caribbean national development plans, which stretched between 5-10 year periods, did not incorporate enough actions to move knowledge management forward.

18. It was suggested that embedded Caribbean cultural practices, such as storytelling, which had also been used extensively in capturing and sharing tacit knowledge, offered possible local solutions, at least partially, to knowledge management challenges and should not be forgotten in the development of initiatives and strategies.

19. The discussion concluded with the statement that knowledge management was a difficult process to sell to practitioners and to recipients of the benefits. It might, therefore, be necessary to repackage that process as other concepts, more familiar ideas, such as capacity-building or communication. Lastly, it

was suggested that both citizens and public service personnel should be sensitized to the concepts and processes of managing knowledge. That would allow for public service personnel to more easily incorporate it into their daily activities, and citizens to know their rights to knowledge and information. It was, therefore, necessary to ensure that training opportunities, both vocational and tertiary, were available.

5. Knowledge capture and retention

20. Knowledge capture and retention were discussed during the third presentation of the meeting. The subprocess of capture was explained as being the identification, selection, organization, storage and reuse of institutional knowledge. The second subprocess of retention was referred to as acquisition, storage and retrieval activities. Both of those subprocesses were said to be of importance for the competitiveness of Caribbean organizations as it would provide for the protection of resources, capacity-building, access to regional knowledge, regional networking and knowledge sharing. The presentation concluded with reflections on the importance of information technology as part of those processes. The importance of technology for capture and retention was highlighted as an enabler, but human involvement was essential for the optimal functioning of the processes.

21. During the presentation, methodological approaches to knowledge capture and retention was highlighted, namely social software, technological and human approach. One participant asked whether the tagging and recording of information, support by the social software approach, was the best solution for Caribbean governments and the region as a whole. That would, however, depend on the needs of the organization. Participants mentioned that it was necessary to remember that, regardless of the system chosen to capture and retain knowledge, it should fit what was captured. Knowledge should never be made to fit a chosen system.

22. One participant observed that as the movement to the electronic, instead of written, recording of data was taking place, the focus had become more one of monitoring of resources and the development of systems that would ensure ease of access to information and knowledge when needed. He questioned whether the public sector had allocated enough resources to ensure the continuous capture and retention of knowledge.

23. An observation was made that clear identification and definition of types of resources collected were necessary, such as what exactly was a record and how did an electronic record differ from the traditional definitions. That idea was further explored in the discussion on the need to determine which information, from all captured, should be made available to the public. It was, therefore, suggested that it was necessary to determine the knowledge and information needs before capture and retention, which would ensure that useful and important knowledge was captured. The process of records management was suggested as a possible starting point for the capture and retention of knowledge.

24. The discussion was concluded with the suggestion that the special challenges and barriers of the Caribbean, with regard to capture and retention, should be identified to ensure the optimal functioning of those processes in the subregion.

6. Knowledge sharing

25. The fourth presentation provided an overview of knowledge sharing, generally known as the continuous transfer, communication and dissemination of information. The purposes of that process were to learn, teach, gain understanding, and find solutions which improved methods of conducting activities to advance development. Barriers to the communication of information were also discussed as well as

issues such as resistance to sharing, traditional organizational structures and, lastly, the fact that what might be available was not known to those that were part of the process.

26. The presentation continued with an exploration of tools available for the purpose of knowledge sharing, specifically the role of information and communication technologies. Again, emphasis was placed on technology as an enabler of the process as it made it easier to communicate faster and immediately beyond traditional borders. As specific tools, intranets, extranets and social media were mentioned. The presentation concluded with a focused examination of social media. The advantages of those media were mentioned, specifically, that they were accessible to all and, therefore, had a wide reach with relatively low financial commitments. It was, however, noted that policies were needed to guide the use of those technologies by personnel and customers, which required active participation for it to be successful.

27. During the discussion, it was noted that it was important to keep the needs of people in mind when sharing or communicating to ensure that knowledge was shared in the correct format. Caribbean farmers, for example, had little need for pamphlets or brochures, but responded better to face-to-face interactions.

28. It was stated that barriers to knowledge sharing existed, specifically with regards to trust between the public sector and the public. That had resulted in reluctance from the public to participate in sharing as they were unsure what the information would be used for. The public sector, on the other hand, also had to consider issues of national security which had led to restricted access and limited sharing.

29. The discussion centred on methods of knowledge sharing, such as Communities of Practice and, specifically, the use of social networks, such as Facebook, Twitter and Youtube. Communities of Practice, it was said, were useful tools and could, as enablers of communication, engender trust. Examples were given such as “conversation rooms” where personnel returning from mission shared experiences with others through stories. That practice had allowed for the interactive sharing and updating of knowledge within the organization. Other methods mentioned included brown-bag luncheons, café setting conversations and book clubs. The latter methods were more informal, providing for a relaxed atmosphere where knowledge could be shared.

30. Participants discussed the advantages of, and barriers to, social media as a tool for knowledge sharing. The general consensus was that those types of media could reach large populations in shorter periods of times and that organizations in the Caribbean had not yet explored the usefulness of social media. It was said that the public sector had not yet realized the full advantages of those types of media and, in many cases, were only used to disseminate information that existed in other formats. In some instances, it was said that the public sector blocked personnel from accessing those categories of media. The example of Haiti was mentioned, whereby in the aftermath of the 2010 earthquake, social media was used by officials to determine the whereabouts of people and helped to identify the missing.

31. It was observed that for social media to be successful it was necessary to engage people and promote its use. The need for training, as well as policies to guide the use and monitoring of those technologies was stressed by participants. Some participants expressed the need to identify “champions of knowledge sharing”, normally an influential individual that would work across the organization to ensure knowledge management initiatives. It was, however, also stated that whichever road was chosen for knowledge sharing, the practices must be sustainable beyond individuals.

32. The discussion concluded with reference to the relevance of traditional media, such as radio within the new age of electronic media. Storytelling was again stressed as an important method for

communication in the Caribbean; participants described the subregion as an oral society in which the radio had always been an important tool. Examples of outreach programmes, televised or video awareness programmes and fairs were named as possible ways to share knowledge in the subregion. The conclusion was that the technologies and media used for knowledge sharing within an organization would depend on the objectives of the organization and traditional media should not be forgotten in those strategies.

7. Creating an online presence as a knowledge management tool

33. The fifth presentation focused specifically on the use of an online presence (also known as web presence), that is, any instance of information about an organization or individual that could be accessed via the Internet. The following facets were explained as being a part of an online presence, namely organizational websites, social media pages, blogs and forums, digital libraries and knowledge repositories, documents, articles, reports, stories, news articles, links. It was explained that the Internet was moving away from being just a tool for dissemination of information and was evolving into a knowledge management tool through the continuous development of new technologies. The presentation concluded with highlighting the difficulties in using an online presence as a knowledge management tool, specifically as it required the integration of various technologies, which, in turn, would require regular updates, development and monitoring.

34. In the discussion, one participant mentioned that mobile technologies and media should not be forgotten and could be described as a further extension of an online presence. That opened new possibilities for representation of information and knowledge and could bridge some limitations experienced with access to and sharing of knowledge due to geographical challenges.

35. Libraries in the Caribbean should be encouraged to grab the opportunities offered by an online presence and ensure that secure access was offered to information. The possibility of thus making a library truly open to all, across geographical boundaries was mentioned. The discussion concluded by observing that the public sector did not make use of the Internet and its technologies to its fullest extent and that changes in many cases depended on a push from the citizens themselves, with little of no initiative from the governments.

8. Evaluation of Caribbean agency online presence

Methodology for measuring online presence

36. During the sixth presentation, a short overview was given of the methodology used to evaluate the current state of development agency online presence. The presentation specifically focused on determining the capture, retention and sharing of knowledge. It was explained that normally, when evaluating websites, attention focused on determining the quality and usability, ease of use and searchability, and search strategies, which is more dissemination of and access to information, rather than considering what could be taught and learnt from frequent interaction with the public, other sectors and development agencies.

37. It was stated that it was necessary to evaluate the online presence in such a way to determine if it adhered to the general understanding of knowledge management routines that should be present for knowledge capture, retention and sharing, and to what extent it was utilized. As that was the first analysis of its kind, it was decided to use an evaluation checklist as well as some general observations to evaluate the online presence of development agencies in the Caribbean. A short overview of the checklist was given, mainly that it was divided into 3 broad categories, 25 sub-categories and contained 73 questions.

38. In the ensuing discussions, participants were asked to comment on the evaluation checklist as an evaluation tool for online presence, and for completeness. Participants commented that the checklist was adequate for its current purpose and that the methodology clearly indicated that the Internet and its technologies should be viewed as more than just methods for information dissemination.

39. Participants were asked to comment on and complete another questionnaire, sent by email, which focused on the internal management of knowledge and information. Comments were that the file was relatively large and slow to open thus making it difficult to complete. Some questions were identified as being unclear. All those comments were taken into consideration for the further development of the questionnaire. All participants stressed the need for such a research tool to move knowledge management forward in the subregion as it would provide data not readily available.

Analysis of data

40. The seventh presentation gave an overview of the data gathered and the analysis made using the evaluation checklist described above. The online presence of 15 development agencies were evaluated. The overall conclusion of the evaluation was that all agencies investigated had placed great effort into providing information via the Internet, but the focus was still on the dissemination of information rather than providing for continued capturing, retention, creating and interactive sharing of knowledge and information.

41. It was also determined during the evaluation that social media had not been fully incorporated in the daily activities of development agencies. Very few of them made use of those technologies, with Facebook being the most popular, and still only used them to disseminate information.

42. In the discussions, participants gave some examples of instances in the past where efforts were made to develop regional solutions to capture, retain and share knowledge, such as the Caribbean Agricultural Information Service and the Caribbean Energy Network. It was mentioned that many of those initiatives began well, but were plagued by lack of capacity and insufficient allocation of priority, which meant that not all had reached the goals set at the onset.

43. Participants said that when designing an online presence it was important to plan its development and take the needs of both the organization and its customers into consideration. Other issues highlighted were the cost implications for the organization when re-designing an online presence as well as the commitment that had to be made toward information management, including continued monitoring and evaluation to ensure that it was regularly updated.

44. Participants agreed that it was necessary to make policymakers and managers aware of the various aspects to be considered when designing a web presence and the role it could play in furthering development. In addition, it was vital to sensitize them to the roles (librarians, knowledge management practitioners, information technology professionals and website administrators) needed to ensure that those aspects were implemented and monitored regularly. That was important as it was said that some organizations lacked the capacities needed, such as librarians and website administrators, to fully develop a knowledge enabled web presence.

45. An observation was made that organizations that practiced knowledge management normally focused on their internal processes and activities. It would, therefore, be necessary to further enhance those processes related to a web presence.

46. Further observations were also made on the questionnaire, sent by email. It was suggested that the survey be conducted via an Internet service such as Survey Monkey to make it easier to access and answer, as well as dividing the questionnaire up in sections. Facebook was suggested as a means of circulating the questionnaire by posting a link to the questionnaire, which would allow access to immediate intended respondents as well as the potential to attract others.

47. The discussion concluded with the agreement that the evaluation checklist had been useful as a starting point for the evaluation of the use of the Internet and its technologies for knowledge management. Both the checklist and the questionnaire were described as learning experiences for participants, bringing issues to light that should be considered in the advancement of knowledge management throughout the subregion.

9. Conclusions and recommendations

48. It was observed that knowledge management within the public sector was not easy to achieve as the focus was on development rather than on success and monetary gain. Participants were asked to comment and also discuss the conclusions and recommendations as well as their views of the role ECLAC could play in advancing knowledge management in the Caribbean.

49. Participants agreed with the conclusions reached and the recommendations made by the study and made some suggestions for further consideration and inclusion. They agreed that a clear need for sensitization and training existed. Training programmes should not be limited to the practitioners of knowledge management activities, but should include all stakeholders such as policymakers, managers, decision makers and the public. Further, it was stated that those capacity-building initiatives should be developed at a regional level and should focus on not just the implementation and use of technologies and media but also a broader range of the role and impact of knowledge management in development.

50. It was suggested that ECLAC take the leading role in driving knowledge management throughout the subregion, that should include the fostering of collaboration and training of all stakeholders, as a centre of excellence.

51. Participants stated that the role of indigenous knowledge and specifically that of oral tradition in the Caribbean should not be forgotten when planning initiatives. It offered the possibility of linking experiences across the region that could be used to enrich a regional framework for knowledge management. Government information services were identified as excellent resources for sharing and promoting indigenous knowledge and should be more utilized in that regard. It was suggested that community and development centres in rural areas be included in programmes geared towards indigenous knowledge.

52. From the discussion, it was clear that a regional strategy and policy were needed to advance knowledge management within the Caribbean and that CARICOM was an important partner to involve in promoting that strategy to policymakers and governments in the subregion. Participants agreed that was necessary to quantify and place a monetary value on knowledge and its impact on development. That was seen as a possible method for justifying the inclusion of knowledge management in national and regional policies and strategies. The regional policy should take into account the current knowledge society status of countries and allow for tailoring to suit their individual needs.

53. Policies and strategies to operationalize social media within the public sector should be developed and implemented. It was also stressed that, when planning policies and strategies to operationalize knowledge management, it was important to use all forms of media and technologies available to ensure

that the customers (citizens) were comfortable with the way they interacted with their knowledge environment. The same was said of planning, implementing and evaluating an organization's online presence.

54. It was suggested that it might be useful to link knowledge management to research and development activities as the innovative ideas connected to those activities were supported by governments. Knowledge should be embedded in those ideas and actions.

55. In conclusion, one participant highlighted that the benefit of knowledge management was, precisely, that there was no correct, fixed recipe to follow, and that it was adaptable to the needs of all those who had and would make use of it.

10. Closing remarks

56. The representative of ECLAC thanked all experts for participating in the meeting. He stated that the Commission looked forward to continued cooperation and collaboration with governments and development agencies in the Caribbean, in an effort to work towards greater development in the subregion through the advancement of knowledge management.

Annex I**List of participants**

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Annex II**List of documents**

Document symbol	Document title
LC/CAR/L.251	Programme of work of the ECLAC Subregional Headquarters for the Caribbean, 2010-2011
ECLAC/POS/2011/KMPS	Provisional agenda
ECLAC/POS/2011/KMPS	Provisional annotated agenda
ECLAC/POS/2011/KMPS/	Provisional programme
ECLAC/POS/2011/KMPS/CRP.1	Draft Study on “Knowledge Management in the Public Sector: “Online Presence” as a tool for Knowledge Capture and Knowledge Sharing”