



SMR-Knowledge.com

527 Third Avenue, Suite 105
New York, NY 10016 USA
+1 212.683.6285

Building the Knowledge Culture

SMR SPECIAL REPORT
MAY 2011

KNOWLEDGE MANAGEMENT EDUCATION FORUM: KM EDUCATORS SEEK CONSENSUS AT FIRST ANNUAL SUMMIT

BY GUY ST. CLAIR

QUICK TAKES:

On May 5-6, 2011, the Knowledge Management Education Forum (KMEF) brought together some 75 educators in the field of knowledge management (KM) to share their thoughts about how KM is taught and how students learn KM. This First Annual KMEF Summit was held on the campus of George Washington University in Washington, DC.

An initiative of the KM faculties of George Washington University and Kent State University, KMEF is described as “an on-going, annual dialog ... an endeavor to identify and grow consensus on the knowledge management body of knowledge, competencies, roles and curriculum.”

The KMEF emphasis is not limited to academic learning providers and includes commercial learning organizations, professional associations, and KM-focused departments of subject-specific education and strategic learning programs.

KM roles and responsibilities: “knowledge workers” (Peter F. Drucker), strategic knowledge professionals, knowledge strategists; roles and responsibilities vary according to the “class” or category in which the knowledge professional works (one description referred to these roles as “above the line” and “below the line”).

KM core competencies: connecting education and strategic learning competencies with skill and ability in knowledge strategy development, implementation, and collaboration, leadership and management skills, plus technical competencies.

Curriculum and next steps: continuing dialogue on the larger subject of KM education, with special effort to connect the academy to the business community (and vice-versa) on an on-going basis. Working groups will report back by November and KMEF Summit organizers will create agenda for the next annual summit.

KEY WORDS: Knowledge Management Education Forum, KMEF, Knowledge Management, KM, Knowledge Services, Knowledge Strategy, Kent State University, George Washington University,

On May 5-6, 2011, the Knowledge Management Education Forum (KMEF) brought together some 75 educators in the field of knowledge management (KM) to share their thoughts about how KM is taught and how students learn. This First Annual KMEF Summit was held on the campus of George Washington University in Washington, DC.

An initiative of the KM faculties of George Washington University and Kent State University, KMEF is described as “an on-going, annual dialog ... an endeavor to identify and grow consensus on the knowledge management body of knowledge, competencies, roles and curriculum.”

It’s a big task, but not a surprising one, since people involved in KM, knowledge services, and knowledge strategy are almost unanimously characterized as “big thinkers,” as being “forward-looking” in their approach to knowledge sharing in the workplace. As knowledge thought leaders, they are – at some

point – going to give attention to how their work can be thought about so more people can access it and understand what they do.

The KMEF Summit was a welcome step in this direction, and the discussions at the summit did nothing to dispel that “big-picture” characterization. Any new or recently articulated discipline can benefit from shared concepts, a basic lexicon, and some level of mutual understanding about what the topic means when it comes up and is discussed. Certainly knowledge, essential in all human endeavors, is and has been for centuries a continuing subject of conversation and interaction, and any attempt to give structure to how knowledge is developed and shared in the workplace is a laudable endeavor. In our current management environment and with specific attention having been given to KM for the past couple of decades or so, we are at the perfect point in time to consider how KM can be made to “work” in the workplace.

The KMEF approach to KM education is spelled out in a [framework](#) captured by the organizers of both the summit itself and the [seven prior webinars](#) presented during March and April. Basically, many of those who teach KM feel that there is a case to be made for consensus among the people and organizations “currently providing training, teaching knowledge management courses, [and] supporting knowledge management programs and departments.” A critical point to be made is that the emphasis here is not limited to academic learning providers (some 46 or so of which have been identified throughout the global KM community) but includes commercial learning organizations, professional associations, and KM-focused units or departments of subject-specific education and strategic learning programs. All are giving attention to how knowledge development and knowledge sharing (KD/KS) can be strengthened within the broader working environment. For its part, KMEF seeks to bring these many different players together so that a classic “big tent” community can be achieved.

Why? Again, KMEF’s published goal provides the best explanation:

“The increased focus on the knowledge economy has heightened interest in knowledge management as a profession, an occupation, and its essential competencies. Many believe that it is time to acknowledge that Knowledge Management is a professional area of practice and to begin a formal discussion of the educational foundation needed to support this area of professional practice. While there is a wealth of published and informal literature, thought derived from practice, and dialog on these topics, a consensus on what constitutes the core elements of knowledge management competencies and knowledge management education is lacking.”

Roles and Responsibilities. The format for the summit was structured around four panel discussions, each reacting to a specific question posed by the meeting’s organizers and including participation from summit attendees.

The first discussion question asked panelists, based on their experiences, research, and perceptions, to describe their thoughts about the strategic roles and responsibilities of knowledge professionals in organizations today.

A wide-ranging discussion ensued, with panelists building their comments around the term “knowledge professionals.” Naturally, Peter F. Drucker’s famous term – *knowledge worker* – was given consideration. These employees, as Drucker described them in his 1973 *Management: Tasks, Responsibilities, Practices* are the people who undertake such activities as writing, analyzing, and advising. They are often not thought of as knowledge professionals, *per se*, and much of this work is performed by subject-matter specialists in all areas of an organization. It is this practice which leads, in some organizations, to the “promotion” of these individuals – people who act and communicate with knowledge within a specific subject area – to a larger or broader organizational role as “knowledge manager.” In this case, the connection with formal or academic KM learning, or even professional development or strategic learning, is often limited or if undertaken, self-driven.

A second role discussed by the panelists is that of the strategic knowledge professional. Often thought of as “information professionals,” “content professionals,” records managers, archivists, and related roles supporting the management of the organization’s knowledge domain, these employees usually can be counted on to contribute to an enterprise-wide understanding of a subject or group of subjects through focused analysis, design and/or development, and they use their research skills to define problems and to identify alternatives. They generally connect to professionals in other disciplines and work (generally) with captured knowledge – tangible information – in physical or electronic repositories, with the distinction being that the knowledge these professionals manage is strategic, directly connected to organizational or corporate effectiveness.

The first panelists also identified a third “level” of knowledge professional, the organizational or corporate knowledge strategist whose work is that generally thought of as the management of knowledge services. With knowledge services usually defined as the convergence of information management, KM, and strategic learning, or, perhaps better put, as developing and implementing strategies for managing information, knowledge, and corporate or organizational learning, these activities provide focus for the knowledge strategist for matching the corporate knowledge strategy with the organization’s business strategy or mission. As employees, knowledge strategists are expected to design and plan knowledge-related activities and policy, and are particularly expected to give attention to future knowledge-related roles and activities that will affect corporate or organizational success

So a final conclusion of the panel was that roles and responsibilities vary according to the “class” or category in which the knowledge professional works (one description referred to these roles as “above the line” and “below the line”). The work might be service-based (that is, providing a service that is knowledge-focused) or it might be a managerial or leadership role, perhaps departmental or having to do with one or more functional unit or, in an ideal situation, connecting to an enterprise-wide knowledge function or activity.

KM Competencies. The summit’s second panel was asked, “What competencies do today’s knowledge professionals need to lead knowledge organizations in the 21st century?” In discussing the topic, a first step was to identify some of the work being done by KM practitioners. For example, there are many people working in the field who do not have formal or theoretical KM background but, as noted earlier, they perform KM roles in their organizations, sometimes because they already hold a domain/subject specialty, qualifying them for “managing” subject-specific knowledge.

As the competencies discussion continued, both panelists and summit attendees wrestled with trying to define what specific competencies contribute to success as a knowledge practitioner. For example, it was made clear that KM focuses on knowledge utilization, so part of the solution is to identify competencies that ensure appropriate knowledge utilization in the parent company or organization, whatever the subject area. These can be arrived at through an enterprise-wide knowledge audit or assessment (both Ernst & Young and APQC were identified as providing leadership in this work), but the findings of the assessment must be matched against a business and political orientation on the part of the knowledge practitioners, to ensure that the role of KM is understood and accepted in the larger organization.

This line of thinking led to further discussion of the distinctions between knowledge workers and strategic knowledge professionals/knowledge strategists as outlined earlier. Panelists seemed to agree (with much participation from the audience) that leadership and management skills – especially with respect to the utilization of multiple technologies – must be built in to performance expectations for knowledge employees.

In discussing core competencies, considerable attention was given to the need (for all employees) for connecting education and strategic learning competencies with skill and ability in knowledge strategy development, implementation, and collaboration, and all agreed that technical competencies – even if

only from the position of managing employees with information technology or information services skills – is basic to success as a KM professional. Attention was given to, as one attendee commented, pushing KM "down" into organizational and community networks, and stretching the KM professional's focus beyond "knowing" *about* KM to being able to help people "do" KM.

One well-received summary of required KM competencies (stimulating much discussion) was offered by Denise Lee, from PriceWaterhouseCoopers, who noted that in defining a "competency" at PWC, four characteristics come into play:

- Share knowledge
- Build relationships
- "In each other's shoes"
- Build quality

With these four "standards," as they might be called, management can begin to build specific competencies for knowledge professionals.

As the discussion moved into competency development, Ed O'Neal, Learning Transfer Manager at Shell Exploration and Production, described an accepted KM methodology at Shell, to have people work in the KM area for a specific period of time and then provide them with the opportunity to move to another operation, bringing them back into KM as their complementary skills advance. Madelyn Blair of Pelerei also spoke to competency development, noting that in one situation asking only two questions ("What do you spend most of your time doing?" and "What do you like to do best?") provided a successful response that could be used to establish competencies required for KM work.

While it became difficult to identify a specific list of "hard-core" competences for success in KM, knowledge services, and knowledge strategy, the discussion provided KM educators with valuable direction for what corporate and organizational leadership requires from knowledge practitioners. Further discussion will enable KM teachers – whether in the academic environment or in other knowledge education areas – to begin to focus on practical needs and match them with theoretical basics. At the same time, effort will have to be put into identifying how to create external recognition of KM competencies, especially for corporate and organizational leaders who require guidance in KM as they seek to establish expectations for the work provided by KM practitioners.

Curriculum and Next Steps. As the summit moved forward into its second day, there was general agreement among all attendees that continuing dialogue on the larger subject of KM education will be required, and special effort will be needed to connect the academy to the business community (and vice-versa) on an on-going basis, leading to a suggestion that the KME Forum might evolve into a sort of international advisory board.

As for learning activities, the third panel undertook the important challenge of determining, as summit organizers had phrased the question, "the core and elective elements of a knowledge management curriculum for the 21st century." They began with the four "pillars" of KM as put forward in "Knowledge Management – The Architecture of Enterprise Engineering" in Dr. Annie Green's Webinar, [PLANT the Right Seeds to GROW: A Harvest of Knowledge](#) (March 15, 2011), citing Dr. Michael Stankosky and Carolyn Baldanza's "A Systems Approach to Engineering a Knowledge Management System":

1. Leadership – deals with the environmental, strategic, and enterprise-level decision-making processes.
2. Organization – deals with the operational aspects of knowledge assets
3. Learning – deals with organizational behavioral aspects and social engineering
4. Technology – deals with the various information technologies that support and/or enable KM strategies and operations

Additionally, panelists (and audience members) made a strong case – matching what was reported earlier – that the curriculum should include a focus on the "big picture" which, for some students, might require a shift in perspective. On the other hand, some students are known to ask for "tools" instead of concepts and theories, and agreement was reached that, generally speaking, there is a definite requirement for studying both the theoretical and the practical.

Attention to career enhancement and planning was suggested as important curriculum elements, and the use of case studies, story-telling, affinity diagrams, and similar experience-sharing mechanisms was strongly desired, as they will be required in the workplace (as will be presentation skills, it was noted, since so much of the knowledge practitioner's work requires presentations and teaching ability).

Other curriculum "basics" for KM included attention to (if not specific courses in): measures and metrics, collaboration and networking, and organizational development and effectiveness. All agreed that entrepreneurial thinking is a must, bringing forward another interesting "Ah hah!" moment for summit attendees with the suggestion that those responsible for the KM curriculum might consider "peddling" the basic/fundamentals KM course as an elective in every other school or program in the university (an activity – it was noted – currently practiced in some other countries, particularly in professional programs at some universities in Kenya and other African countries).

As the curriculum discussion concluded, a curious question from the audience brought forth considerable conversation, both from panelists and attendees: Can you envision a KM program without courses?

Obviously, with this group, much discussion could be expected and that is exactly what followed, but without reaching any conclusion. One attendee remarked that an outcomes-based curriculum, creating outcomes that leadership in the KM field established and made clear were desired by organizational leaders, might be one approach to teaching KM. Another commented that academic learning and research would continue to be important but matched against them would be valuable practitioner-based learning and knowledge based on practitioner roles and learning and experiential KD/KS.

The final discussion – seeking next steps following the summit's conclusion – was to determine how to "formalize" the approach to KM education, and the fourth panel was asked, "how can the KM teaching community support competencies in professional training, at a certificate level, and at the master's and Ph.D. levels?"

The discussion that followed focused very much on strategic learning and how important it would be to tie any formal education requirements for KM into a larger, perhaps societal learning effort. Reference was made to criteria put forward for the Malcolm Baldrige National Quality Award, and the panelists' discussion gave some attention to the need for a systems approach to the different sectors of KM.

As part of the discussion, the group discussed certification but was unable to come to any conclusion in answering the question: What are we certifying? Since there is no national or international standard for KM at the present time, is it possible to determine what functional areas work with KM? Or to provide certification in those areas? Until work has been done and agreement reached on the subject of certification, attendees seemed to agree that the one value of certification would simply be that the person receiving the certificate was certified to having taken a course or participated in a program in one or another aspect of KM.

As the group discussed certification, the conversation moved into giving attention to the development of a professional association, credentialing for careers as knowledge practitioners, and accreditation. As there is at present no body established for this sort of activity, the suggestion was made that summit attendees create working groups built around the four forum questions, work together on those issues, and report back at a later date. Following the group reports, forum organizers will then create an agenda for the next annual summit, including attention to certification, the development of a professional association, and credentialing and accreditation.

While there is general agreement that KM, knowledge services, and knowledge strategy require, as noted earlier, an understanding of shared concepts, a basic lexicon, and some level of mutual understanding about the elements and framework of KM, there continues to be concern that too much “standardization” might work against the success of KM in the workplace. One important consideration that doesn’t seem to be given attention is the great variety of types and “versions” of KM found in different organizations and businesses. KM leaders who work across various and different sectors of the much-talked-about 21st-century “knowledge economy” recognize that every organization is different (often uniquely and proudly so) and the success of KM, knowledge services, and knowledge strategy in each is going to depend on how well these elements of the corporate knowledge domain match unique management methodologies and leadership structures in place in each workplace.*

Thanks to the panelists, far too many to name in this brief report (a communiqué or full summit report is to be published shortly, to provide detail about expectations and future plans – readers should check the [KME Forum site](#) for information about the publication of the report), and thanks to the many attendees who participated in the First Annual KMEF Summit. All attendees and participants seemed to take away a great deal of understanding and inspiration about the role of KM in the modern workplace.

And special thanks to the organizers from George Washington University and Kent State University and, particularly, to the two principal organizers, Dr. Denise Bedford, Goodyear Professor of Knowledge Management at Kent State University, and Dr. Annie Green, Assistant Professional Lecturer, George Washington University, and Principal, Institute of Knowledge and Innovation, Adjunct Faculty, Kent State University, and Knowledge Management Practice Lead, Keane Federal Systems.

Everyone involved did a great deal of work to ensure that the First Annual KMEF Summit came off successfully, and their hard work was well rewarded. Kudos all around.

The author: Guy St. Clair is President and Consulting Specialist for Knowledge Services at SMR (www.smr-knowledge.com), a New York-based management consulting practice focused on change and its impact on people, organizational effectiveness, and the management of intellectual capital within the larger enterprise. The author of many books and articles on KM, knowledge services, and knowledge strategy, Guy St. Clair teaches in Columbia University’s Master of Science in Information and Knowledge Strategy program.

* [Connected to this idea, a useful exercise might be to look at Richard Barker’s article “The Big Idea: No, Management is Not a Profession” (*Harvard Business Review*, July-August, 2010) and have some fun substituting the phrase “KM education” wherever the term “business education” appears, or “knowledge management” wherever the term “management” appears. It’s a neat way to approach how we might think about teaching KM, knowledge services, and knowledge strategy.]