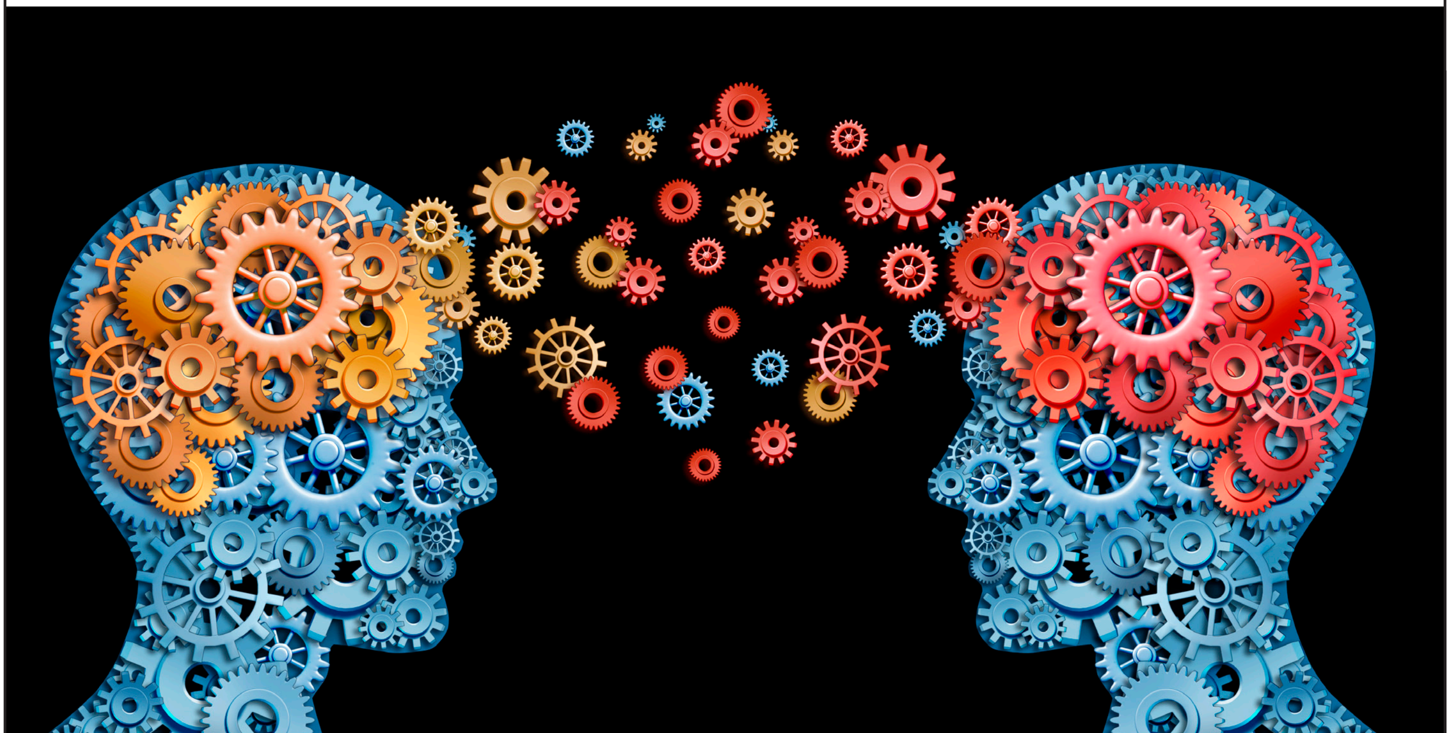
THE McKNIGHT FOUNDATION

CASE STUDY



Knowledge Management: A Discovery Process

A case study prepared by The McKnight Foundation

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Introduction

Established in 1953, The McKnight Foundation's mission is to improve the quality of life for present and future generations through grantmaking, collaboration, and policy reform. In 2013, we granted about $86 million through seven program strategies, and presently manage a private endowment totaling just under $2 billion. Without question, *money* is an important asset in our work and perhaps the attribute by which we and other philanthropies are best known. But this brief report is about an additional, invaluable asset that also requires our organization-wide attention, resources to manage, and targeted strategies to use wisely: *Knowledge.*

Whatever your field, it's possible you're sitting on a goldmine of information you may or may not even know you have. With McKnight's diverse programs and 60 years of partnerships in Minnesota and around the world, we often find ourselves at the center of meaty, data-rich analytic conversations. When we are paying close attention — which we hope is often — our own program efforts benefit directly from our access to program-specific knowledge. But is that enough?

Knowledge: Any information we organize and use.

Shows up in lots of different forms — documents, reports, evaluation conclusions, points of view, informed perspectives, or more.

By the fall of 2011, amid a national buzz around big data and information storage, McKnight's staff and board were growing more and more aware of our valuable position at the nexus of multiple, converging streams of knowledge. Through incoming grant reports, field research, partner convenings, and more, we recognized a rush of data swirling all around us. But the more we looked, the less confident we were that we were making fullest use of all that good information. And even what we *were* doing at the time around knowledge gathering and sharing seemed more ad hoc than intentional.

It seemed we needed a clear, foundation-wide knowledge management plan... Or maybe a guide, plus a powerful, integrated database? Or just a general framework? Truth is, we didn't have a clear idea of exactly *what* we needed, to get more intentional about using and sharing knowledge. So as a fitting starting point, we decided first to gather a little more knowledge about knowledge management.

When exploring emerging interests at McKnight, we generally start by looking to field experts and best practices. Before diving in, we want to benefit from individuals and organizations with firsthand, meaningful experiences or expertise to share. But when searching for a solid knowledge management model, we found several organizations with developed approaches but none that seemed like a good model for McKnight's unique challenges and opportunities. So we committed to a full year looking closer at our mission with regards to knowledge sharing, our field and community roles, and current and potential new practices around how we use and distribute knowledge — all to ensure we're doing the most we can with current resources, and also to make improvements where needed.

This white paper summarizes McKnight's approach looking at this issue, and shares some of our big takeaways from the process. We've aimed to capture our best institutional memory of what occurred, based on documents created during the process, interviews with key staff, and a full staff survey.

Early in our research, a report on organizational learning from The Bridgespan Group provided ideas that helped McKnight leadership staff create a model for discussion and discovery. In lieu of knowing the right *answer* to aim for, we decided to start off with just asking ourselves some good *questions*.

Why Knowledge Management?

By the summer of 2011, McKnight Foundation staff were asking a lot of questions about our use, storage, and dissemination of data, information, and knowledge.

An early example came from our International program team. The team was running into issues related to data collection, management, and storage tied to both administrative and grantmaking components of their work. Managing large blocks of data and related analysis was especially complicated because the program operates in several countries, in collaboration with contracted consultants who might benefit from access to information stored on McKnight's network, but who aren't *allowed* access because of privacy and security issues. Also important, McKnight's international Collaborative Crop Research Program is itself a grantee of the Bill and Melinda Gates Foundation, and our reporting requirements as a grantee require a level of detail that McKnight's staff found themselves challenged to meet.

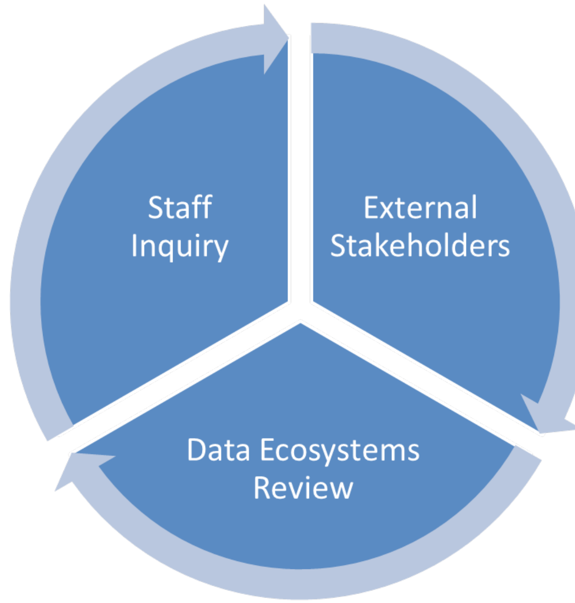
Team members started researching possible options for the International team to tackle gnarly issues around knowledge management, but soon realized that any workable solution would also need to integrate with the Foundation's broader systems. In fall 2011, the International team approached McKnight's vice president of administration and the communications director, inviting a deeper, Foundation-wide conversation on the topic of knowledge management.

Around the same time, other departments at McKnight were running into their own questions related to knowledge management. The Compliance team was digging into Enterprise Risk Management, a process by which organizations inspect how their systems work to identify presence or potential for risks. The Communications team was also midway through redesigning McKnight's website for the first time in over a decade, with souped-up online databases and additional platforms for sharing more of the reports and research coming in all the time from grantees and partners. Grants administration was grappling with evaluating both the limitations and the underused benefits of our heavily trafficked grantmaking database. We were on the verge of surveying both grantees and non-grantee stakeholders about their perceptions of McKnight's work and impact. And across programs, staff were pointedly communicating more than ever before with grantees, but rarely capturing those conversations in ways that maintain value after the initial conversation.

Finally, staff leadership and the board of directors were in the process of creating McKnight's Strategic Framework to guide the Foundation's work. In addition to discussing strategic grantmaking, the group actively considered the earned external trust in McKnight's value as a generator and facilitator of ideas, research, knowledge, best practices, and wisdom. In balance with McKnight's long held propensity to do good work quietly, the board understood the power of our "credible influence," if exercised wisely, to prompt improved behaviors, policies, and systems. And we recognized that our credible influence is often fed directly by knowledge — both in how we gather it and in how we redistribute it.

Suddenly, knowledge management was more than an interesting side note; it was at the very heart of our current mission and our aspirational plans for the future. The McKnight Strategic Framework was released publicly in spring of 2012.

That summer, administration and communications staff leaders created an official staff inquiry process for the Foundation to begin exploring knowledge management more intentionally. As a starting point for all discussions, the project vision stated, "We manage and share knowledge to maximize McKnight's credible influence in support of mission and programs." Echoing a mantra recently adopted for internal processes at McKnight, it was agreed that all related research and analysis would be conducted in a manner that is *simple, useful, and sustainable.* (Separate story, but we've found those three words to be exceptionally useful benchmarks for managing internal projects.)



To help create a cohesive scope and workflow, staff leaders chose to gather three discrete explorations that year — the aforementioned grantmaking database evaluation; external perception surveys; and staffwide team "Q&As" — under one unified "three-legged stool" of knowledge management exploration. Since all three projects would support stronger, more effective work towards mission and programs, we decided the projects should not be looked at in isolation. Our plan was to let each project follow its own path, but also to thoughtfully tie those paths together in a way that generally informed our staffwide understanding of knowledge management and knowledge sharing.

Our Three-Legged Stool

Leg One: The Staff inquiry Process. After the topic of knowledge management had been introduced, we began researching knowledge management models, hoping to find another foundation or partner that had created a replicable model. In October 2011, McKnight's vice president of administration attended a Foundation Financial Officers Group conference in Seattle, where The Bridgespan Group presented a session on organizational learning within nonprofits.

In follow-up conversations with Bridgespan and other organizations, McKnight's senior leaders began to get a better sense of the issue's scope. We weren't able to identify any "off the shelf" solution; peer organizations simply didn't seem to have models that could easily be applied to McKnight. On the contrary, in fact, several organizations we spoke with reported investing lots of time and money into complex data-management systems that eventually became unsustainable. Again, such early research informed our continued use of the mantra "simple, useful, and sustainable" throughout our knowledge management discovery process.

Internal Objectives: We will develop knowledge management processes and culture to enhance *internal*

- decisionmaking, risk-taking;
- adapting to challenges, opportunities; and
- positioning as a creative catalyst.

External Objectives: We will develop knowledge management processes and culture to enhance *external*

- collective wisdom;
- general mission-supportive impact; and
- field-specific impacts.

The Questions

As previously mentioned, we used national conference presentations and subsequent discussions with other organizations to help develop our staff inquiry process. Pulling inspiration from a set of questions Bridgespan had created to survey nonprofits about their use of knowledge in mission-driven work, we developed a set of questions for our staff to answer. McKnight's questions invited each staff team to consider how McKnight historically uses knowledge for its decisionmaking; which tools and assets are most and least useful in this; and how our foundation culture helps or hinders knowledge sharing.

Early, we knew we wanted to engage all staff in the inquiry process, but also wanted to keep the burden on workloads to a minimum. With this in mind, we spread three sets of Q&A exploration — including team discussions, workgroup analysis, and staffwide follow-up — over the course of three quarters.

Internal and External Lenses

McKnight's success depends on *internal* systems and processes that support and enhance our capacity for *external* impact and influence, so we knew we needed to exploring ways to improve our work inside and outside our office walls. With an understood need to talk about knowledge both in terms of its internal and external impact, we asked staff teams to respond to a series of questions from both an internal and an external perspective.

For further analysis of teams' answers, we also created two workgroups — an Internal Lens Workgroup and an External Lens Workgroup. United by an overarching vision to *"manage and share knowledge to maximize McKnight's credible influence in support of mission and programs,"* it was envisioned that through our internal lens, we would focus on developing knowledge-management processes and culture to enhance internal decisionmaking, adaptation to new challenges and opportunities, and positioning as a creative catalyst. At the same time, our external lens would focus on developing processes and culture to enhance external collective wisdom, mission-supportive impact, and field-building.

In January 2012, staff were surveyed about their individual interest level in this discovery process. Input from this survey, as well as a goal to strike job role and managerial balance, all went into creating the Internal and External Lens Workgroups. McKnight's communications director was to facilitate the external lens workgroup, and the VP of Administration would guide the internal lens workgroup. For each, we pointedly chose people for a mix of roles and perspectives in each group.

The Process

With discussion questions written and our Internal/External Lens (analysis) workgroups established, we were ready to launch our "discovery process" in July 2012. The first set of questions was emailed to staff, and department teams met to discuss and formulate responses. In response to each quarter's questions, teams provided a few concise paragraphs or bullets, and also presented three-minute highlights of their input with one slide at a quarterly staff meeting. The first round of team report-outs were shared in September, with each team taking two minutes to summarize their discussions. Shortly after the first round of staff presentations, our *second* set of questions was distributed for teams to start working on.

Staff Question: General Themes

Quarter 1 → Historic vs. Current
Quarter 2 → Tools
Quarter 3 → Culture, leaders, and systems

Recurring → What do you need?

* *See appendix for all questions.*

While staff teams dove into the second set of questions, our two (Internal and External) Lens workgroups convened separately to discuss the various teams' written and spoken input. The workgroups' analysis was guided by a facilitation method for pattern recognition, developed by Glenda Eoyang of the Human Systems Dynamics Institute. Using the method, our workgroups identified patterns in staff responses through discussion of perceived generalizations, exceptions, contradictions, surprises, and puzzles throughout the gathered input. After their respective meetings — one primarily focused on staff responses' internal implications, the other focused on external implications — the workgroups compiled formal written analysis and emailed the pattern discoveries to staff.

In the first quarter, analysis was simply shared with an opportunity for discussion at a full staff meeting. In subsequent quarters, the Lens workgroups presented findings more formally to the staff (in addition to sharing written findings in advance), and invited feedback and questions.

Staff teams reported their second round of answers in December 2012 and their third set of answers in March 2013, each followed by a round of Internal/External Lens analysis and subsequent reporting back to full staff. In addition to quarter-specific questions that changed with each round, the teams were asked one question repeated from quarter to quarter — *what information do you need right now, for internal decisionmaking and for external impact?*

Including the repeated question, staff were effectively asked four rounds of questions related to knowledge sharing and knowledge management, over the course of three quarters. The staff inquiry process wrapped up by April 2013, with a final joint meeting of the two Lens workgroups to conclude the groups' analysis and to provide insights about the process experience.

Patterns Overview

The Lens workgroups methodically searched for patterns in staff responses:

Generalizations
"In general I noticed..."

Exceptions
"In general... but..."

Contradictions
"On one hand... and on the other..."

Surprises
"I didn't expect..."

Puzzles
"I wonder..."

Describe the pattern
Who's involved?
What's happening?
How are people responding?

Credit: Human Systems Dynamics, hsdinstitute.org

Leg Two: External Perception Reports

Center for Effective Philanthropy's Grantee Perception Report

Starting in 2003, McKnight engaged the Center for Effective Philanthropy (CEP) — a nonprofit research group — to survey recent grantees. CEP gathers anonymous feedback about various components of foundations' work, including the grantmaking process, communications, and overall impact, and then compares results to grantee perceptions of other foundations around the country. McKnight has participated in CEP's Grantee Perception Survey four times: 2003, 2006, 2009, and 2012. Each time a Grantee Perception Report is issued, McKnight strives to use what we learn from grantees to make concrete, meaningful improvements in our program and grantmaking processes and communications.

Because the Grantee Perception Report is such a useful information source for McKnight, we felt strongly about considering it this year within our overall framework of knowledge-related considerations. Akin to other important sources of knowledge, CEP's Grantee Perception Report has a track record of notably affecting both McKnight's *internal* systems and processes and *external* relationship-building and communications.

External Stakeholder Survey

With ongoing appreciation for the significant power of our *grantee* relationships, McKnight leadership has also recognized increasingly that our success depends on critically important working relationships with program stakeholders *beyond* our grantees. With this in mind in 2012, we conducted our first External Stakeholder Survey of *non-grantees*, to help gauge McKnight's credible influence among elected officials, the business community, regional partners, other foundations, the media, and more.

In the fall of 2012, McKnight hired public affairs firm [Himle Rapp & Company] to conduct the survey. Staff leadership helped develop the survey methods and content, which included an online survey and select one-on-one stakeholder interviews. At the same time, program teams helped develop the lists of non-grantee stakeholders, including established partners in program fields as well as those who have voiced opposing approaches. The final list to be surveyed included approximately 400 stakeholders from around our state, the region, and the nation.

Himle Rapp & Company conducted the survey and interviews in the winter of 2013 and presented the results and key findings to the Board of Directors and leadership staff by the spring of 2013. A broad knowledge management frame was expressly considered throughout survey development, and in reporting findings back to McKnight's staff and board of directors, given the potential implications for both internal operations and external relationships and communications.

Leg three: The Data-Ecosystem Evaluation

As a best practice, McKnight's staff leadership decided years ago that we would evaluate our grantmaking database every five years, to determine if system changes are called for to address changing needs in program practices or technology, etc. With our five-year mark approaching in the summer of 2012 — and program teams expressing growing needs for more interconnected, useful internal systems — we began planning for an in-depth evaluation of our grants data management systems, with a very real possibility emerging that it might be time for a change.

For this evaluation, we wanted to bring in a field professional with a demonstrable national scope. After a robust RFP process, McKnight contracted with Marty Schneiderman with Information Age Associates. The Foundation's grants administration director had already assembled a staff workgroup made up of representatives from key departments, to work closely with Schneiderman throughout the project — assessing staff needs, considering our current system, and exploring other options for the future.

With clear internal and external implications around how we solicit, analyze, organize, and share grant-related knowledge, this leg of our "knowledge management stool" is ongoing. At this time, Schneiderman continues to help staff explore and consider the best opportunities for moving forward.

The Analysis

Especially throughout the quarterly staff inquiry process — but also explicitly embedded within the context of the external perception reports and database evaluation — staff gathered a ton of information from 2012 into 2013 about how we gather, organize, and use the wealth of knowledge to which we have access. In May 2013, staff were surveyed anonymously about what they had learned from the experience. This section on broad analysis from our findings draws on the results of this staff survey, extensive notes from the Internal/External Lens workgroups, and interviews with key staff.

Knowledge Management Vision:
We will manage and share knowledge to maximize McKnight's credible influence in support of mission and programs.

Benefits. Regardless of project-related outcomes, the majority of staff voiced a belief that we are in a better place simply because of the *process,* and the opportunities it created for team, staff, and workgroup analysis. In response to the survey question, *"Do you have a deeper understanding now than you had in August 2012 of how different teams at McKnight value and use knowledge?,"* every respondent answered yes. Staff members were engaged and thoughtful throughout team and full staff conversations. Making the discussions a requirement forced everyone to step back from the day-to-day grind to participate, and to reflect both on bright spots and on room for improvement. Many staff noted in the comments of their surveys that they benefited from hearing other teams' feedback.

Another survey question asked staff to identify which elements of the staff inquiry process were the most informative. The top two answers were "Internal and External Lens analysis" and "having all teams discuss the same topic." Many staff members felt that using both the external and internal lenses prevented staff from focusing too much on just our day-to-day operational needs and processes. The experience was so positive around such staffwide conversations that we are considering other topic areas to explore through similar, quarterly team Q&As.

Another positive outcome from staffwide conversations around knowledge-sharing is McKnight's experimentation with Yammer, a private and secure social network for businesses and organizations. After hearing from other national colleagues like grantee and partner Living Cities, who are more deeply enmeshed in knowledge management and interactive communications, McKnight's staff started thinking about options for staff to share what they know with each other, in engaging ways. Since its introduction in late summer 2012, staff have used Yammer as a new channel to share information, links, photos, and videos about conferences they have attended, grantee news, regional developments, boards or panels they've served on, or just topical updates on *anything* having to do with McKnight's mission, operations, or program strategies. (So no cat videos without a strategic tie-in!)

Frustrations. In the beginning of the process, there was some general confusion about our goal and even about what the term "knowledge management" means. From the get-go, we wanted the staff discussions to be about open-ended discovery, without a particular end-game in mind; staff comfort levels with such abstraction varied. Toward the end of our third quarter of questions, Living Cities' CEO Ben Hecht spoke to staff about his organization's experience with managing knowledge, where the focus has been on *turning knowledge into influence*. Hecht explained that Living Cities' staff are expected to mine information and knowledge, and push it out to their networks via social media and other channels. His interpretation of how *internal* knowledge can be put to use *externally* helped many McKnight staffers understand the potential for impact. In the staff survey, Hecht's discussion with our staff was rated as "very informative," on par with our Lens groups' internal and external analysis.

We only set a few basic rules for the quarterly, brief report-outs. Some teams chose to present several broad themes, others got specific with multiple examples around one theme. The resulting variations resulted in some staff embracing the teams' individuality while others disparaged inherent inconsistencies that made it harder for them to process the information.

And by the end of the third set of questions, staff felt their answers (and their colleagues' answers) were starting to become repetitive from quarter to quarter. Although this was a concern and frustration for some, a program staffer during a Lens workgroup meeting explained that in accumulating data in qualitative research, it is standard to consider your data-set complete *when the questions you're asking consistently elicit the same responses*. With perfect timing to complete our own data set, we concluded our staff Q&As with the third round.

Basic Calendar

Summer 2012:
- Ask & discuss Q#1.
- Orient I/E Lens workgroups.

Fall 2012:
- Answer & analyze Q#1.
- Ask & discuss Q#2.

Winter 2013:
- Answer & analyze Q#2.
- Ask & discuss Q#3.

Spring 2013:
- Answer & analyze Q#3.
- Lens group final analysis, staff retreat discussion.

Summer 2013:
- Determine next steps.

What staff analysis revealed. Our staff inquiry questions invited teams to think about how McKnight historically has used knowledge for decisionmaking; what important tools and assets do we already have in place; how does our culture support knowledge sharing; and what specific knowledge do our teams need right now to improve our own decisionmaking as well as our outward-facing influence. Staff input and Internal/External Lens workgroups' analysis provided several salient points, which were further confirmed and supported through the final staff survey. A few key takeaways:

Staff agreed, first and foremost, that we need to make better use of existing resources.

- **For us, there is no silver bullet.** Initially, some staffers had hoped for one integrative software program or data system that could simplify and reduce administrative workloads while tying together McKnight's entire, foundationwide knowledge base. After a year of discussions, however, it's now apparent that one software program to meet all needs —

internal, external, at home, abroad, across programs and teams — is *not* a workable solution for collecting, managing, and leveraging knowledge. Many staff note that McKnight already has a strong set of tools to manage and share knowledge; we just need to use them more effectively and intentionally.

- **Grantees and program partners are invaluable sources of knowledge.** With over 1,000 active grants to more than 600 individual organizations working in partnership with countless program partners in Minnesota and around the world, our *access* to useful knowledge is not in question. The problem for our staff is finding useful ways to *harness, organize, and deploy* it. In one External Lens Workgroup meeting, group members discussed the possibility of hiring a meeting facilitator to attend convenings of grantees and partners, and help analyze and share what was learned at those meetings. Similarly, staff do not want to burden grantees by asking for information we can't or won't use; staff need to be smart about what they are asking for.

- **Staff need to go deep with our grantmaking database.** Department teams' different functions have created a predictably wide range of experience and comfort with our grantmaking database. But the grants database is without question among our most used (and most *under*-used, when full potential is taken into account) knowledge management tool, so it merits serious attention. Staff need more training to better understand how much information is stored in the database and how to access it. No matter which systems we use to manage grants going forward, staff will need more detailed, job-specific training (one size doesn't fit all!), and we'll also likely need to make some process changes to maximize our benefits from this powerful tool.

- **We need to clarify file management on our office network.** Throughout our staff inquiry process, McKnight's program and operations teams have reiterated that our internal file storage and sharing systems need clarity. Where the Foundation lacks clear rules for file management, our department teams have developed their own systems. This has resulted in inconsistent file naming, duplicative storage locations (Intranet, multiple shared directories and network drives, personal directories, etc.), and general confusion about where to store information — plus, at least as important, where to *find* information when you need it. Discussing our existing knowledge assets and tools, staff emphasized a nearly universal frustration about limitations in our use of *current* technology, caused simply by unclear file management guidelines that waste time and breed confusion.

- **It's important to recognize limitations in our own flexibility.** It's easy to wonder, *What good is real-time, practical data, if you can't* use *it in real-time, practical ways?* Although there is desire to improve our programs' capacity to take action on incoming intelligence, staff also recognized that our less flexible administrative systems sometimes limit our ability to act swiftly. Balancing our need for critical due diligence with calls for informed responsiveness, we acknowledge limitations on how immediately McKnight is able to act on incoming information. On average (although not always), our optimal use of knowledge may simply require a longer time horizon. Speed doesn't equal strategy.

Staff called out a need for new, effective methods to translate data into usable knowledge.

- **Real-time info matters in communications.** To take full advantage of real-time communications for sharing developments and supportive messaging, McKnight depends on trusted, timely sources of useful data and analysis. In a staff survey, several people suggested they would communicate via social media on behalf of McKnight if they had a better supply of up-to-date, relevant information.

- **Staff asked for both tools and time for data analysis.** A big discovery for us is how much information McKnight is *already* sitting on, coming in via many different channels from many different sources. Staff told us clearly they don't need a "silver bullet" computer program or system to store and organize all the data; they need *more time* to consume, discuss, analyze what the incoming information means, so they can make strategic decisions about how to store it, toss it, or use it.

Staff embraced our ongoing pursuit of continuous improvements in knowledge management, while noting that a more dramatic ramp-up (if desired) may require additional or redirected resources.

- **Knowledge holds value worth investing in.** When used effectively, distributed knowledge leverages influence. As visiting speaker Ben Hecht, Living Cities, explained at a McKnight staff meeting, a central purpose in gathering and sharing knowledge is to influence partners and networks — and new channels like social media are emerging as a legitimate knowledge-sharing channels. But it does no one any favors to collect information and not use it, so shoring up our capacity for more intentional knowledge-sharing is crucial.

- **We're already making a difference.** Throughout our process, several staff teams indicated they would need greater resources to manage and use knowledge more effectively. Staff surveys suggested hiring more staff or improving efficiencies in existing systems. One survey respondent suggested hiring a Knowledge Management Officer to gather and share knowledge, and liaise between program teams and the communications team.

  The reality, however, is that simply by employing greater intentionality, we're already moving ahead to improve how we collect, organize, and share knowledge. We'll explore some of the staff's efforts at continuous improvement in the next section.

Conclusions and Next Steps

Through discussion and shared analysis, our staff and board have discovered that our collective knowledge is among our most important assets, and it takes different, sometimes surprising, forms in different teams and contexts. Toward the end of our process, we surveyed staff for input on "next steps." A wide variety of answers were provided to that question. The most frequent answer was that we should improve the tools we already have and assess the need for more resources.

So, with an emphasis on *"simple, useful, and sustainable!,"* we've chosen to adapt very specific knowledge management tools to specific audiences and goals as needed, while also pursuing continuous improvements on multiple fronts, rather than developing a brand new institutional framework.

Many teams have already taken it upon themselves to make positive changes in how they work. Three important next steps identify key areas for ongoing attention:

1. **Stay diligent with continuous improvements to leverage all the knowledge at McKnight's fingertips, and enhance external communications for greater program impact and influence.**

   There is much more to do on this front. But the truth is, we've already made quite a few changes for the better as we've gotten more intentional about knowledge management and sharing, including:

   - Evaluative, program-specific reports are regularly posted online and distributed to relevant grantees and stakeholders, to help ensure that knowledge we've gathered can make a positive program impact beyond our walls.
   - Often within our "Food for Thought" series, commissioned reports to help our staff understand the context in which we operate are shared externally and distributed to all program stakeholders.
   - A diversity of staff voices and perspectives from all operations and program staff teams are shared via a new foundationwide blog on our website.
   - We've begun using video to capture knowledge at program convenings, interview knowledge-leaders in areas of interest, and better illustrate our mission and program strategies.
   - A practice since 2003, we continue to share results from periodic "Grantee Perception Reports" contracted through the Center for Effective Philanthropy. The reports offer opportunities for transparency to help grantees understand our approach and our efforts for improvement.
   - Program developments and decisionmaking materials are shared with McKnight's board of directors in more accessible and engaging ways through a new board website portal.
   - From news announcements to program updates, blog posts, video content, and more —

all McKnight’s biggest headlines are packaged in digest form for quarterly distribution to all our grantees and stakeholders, ensuring our most important stories are shared multiple times, through multiple channels, with multiple audiences.
- And to help staff communicate productively within their own roles, the communications team is informing the staff and board about the value of social media, while providing guidelines and training through group discussion and one-on-one tutoring.

2. **Create or clarify rules around network storage and file management, and update the Foundation’s record retention policy.**

   McKnight is currently developing an information management system that is simple, useful and sustainable and is understood by, and adhered to, by all McKnight employees and consultants. The goal is that all information, whether stored physically or electronically, will be accessible, in full compliance with McKnight’s policies and legal requirements.

3. **Tap into in-house knowledge solutions, to maximize operational efficiencies and decisionmaking:**

   - Program and operational developments are shared by and across staff via Yammer, as well as programmed knowledge-sharing at staff meetings, program gatherings, managers’ meetings, and other internal convenings.
   - Our use of a new cloud-based expense and billing system is helping staff to more efficiently share information and documentation with each other and with the Finance team.
   - Now housed on our office Intranet, McKnight’s Employee Handbook is more accessible at all times and from all locations, with clickable links connecting all the most important information.
   - To enhance archiving and ongoing access to all sorts of shared information, McKnight’s intranet is scheduled for a review and upgrade next year.
   - We plan to start more staff-wide conversations like the quarterly staff Q&As — great opportunities to benefit from knowledge our staff brings to work every day, while fostering shared experiences, language, and culture.

At McKnight, we recognize our credible influence beyond grants hinges to a large extent on our ability to gather and disseminate the knowledge embedded in our program work. To do that well, we need to balance our important responsibility as communications facilitator or “network operator” with a longheld (if flawed) philanthropic culture of stepping *away* from conversations to leave our grantees alone at the mic — a tension we’re already addressing, on multiple fronts.

Our path forward will depend on us defining and supporting the best organizational culture, policies, training, and tools to enable our staff to share knowledge gleaned through our work and relationships. We continue very deliberately to embrace new and better ways to gather, organize, and use knowledge. We continue to acknowledge and capitalize on our bright spots. And we've identified plenty of areas ripe for ongoing attention and improvement.

Like countless organizations, The McKnight Foundation captures, organizes, uses, and shares knowledge every hour of every day. Our 2012-2013 discussions and analysis of goals and practices around knowledge-sharing have helped us to be more intentional about maximizing the reach and impact of knowledge, moving program dials and bolstering external influence. Best of all, our way forward was researched and set, and is now *owned*, by our entire staff. Going forward, the shared understanding and vocabulary we've built through staffwide explorations should serve us well to stay attentive and increasingly active in making the most of one of our most powerful assets — knowledge.

Appendix A: Lens Group Members

Internal Lens Workgroup members:

Bernadette Christiansen, VP of Administration (group leader)
Bile Daad, Accounting Assistant
David Kennedy Logan, Communications Officer
Jane Maland Cady, International Program Director
Sarah Lovan, Arts Program Officer
Shaina Briscoe, Grants Administration Associate

External Lens Workgroup members:

Tim Hanrahan, Communications Director (group leader)
Aimee Witteman, Midwest Climate & Energy Program Director (Environment Program Officer)
Becky Monnens, International Program Officer
Eric Muschler, Region & Communities Program Officer
Stephanie Duffy, Director of Grants Administration
Vickie Benson, Arts Program Director

Appendix B: Staff members interviewed for Case Study

President, Kate Wolford
Vice President of Administration, Bernadette Christiansen
Vice President of Program, Neal Cuthbert
Vice President of Finance and Compliance, Rick Scott
Communications Director, Tim Hanrahan
Director of Grants Administration, Stephanie Duffy
Controller, Therese Casey

International Program Team:
Program Director, Jane Maland Cady
Program Officer, Becky Monnens
Program Administrator, Karyn Sciortino Johnson

Region and Communities Program Team:
Program Director, Lee Sheehy
Program Officer, Eric Muschler
Program Officer, Sarah Hernandez
Program Administrator, Renee Richie

Appendix C: Questions

Quarter 1 questions:

1. Historically, how has your team used knowledge to improve internal decisionmaking around programs or operations?
2. How has your team used knowledge to improve its ability to adapt to new contexts, challenges, or opportunities?
3. How has your team used knowledge to improve its ability to catalyze program- or mission-supportive action, internally or externally?
4. How has your team used knowledge to enhance external wisdom around our areas of interest?
5. How has your team used knowledge to make positive, program- or mission-aligned external impacts?
6. Internally and externally, where are your team's own past or current Knowledge Management bright spots?

Quarter 2 questions:

1. Currently, what are your team's best/favorite knowledge management assets (e.g., our specific processes, tech, tools, incentives) to build upon and improve our INTERNAL decisionmaking and ability to adapt and catalyze?
2. Currently, what your team's best/favorite knowledge management assets (e.g., our specific processes, tech, tools, incentives) to build on and improve our EXTERNAL program or mission impact and field wisdom?
3. On the flipside, are there processes/tools we should abandon because they're collecting info we don't need or use for any purpose?

Quarter 3 questions:

1. How well do McKnight's <u>culture, leaders, and systems</u> support the gathering and sharing of knowledge to enhance McKnight's EXTERNAL impact and field wisdom? Any bright spots to highlight and/or gaps needing attention?
2. How well do McKnight's <u>culture, leaders, and systems</u> support the gathering and sharing of knowledge to improve McKnight's INTERNAL decisionmaking and ability to adapt and catalyze? Any bright spots to highlight and/or gaps needing attention?

Recurring Questions, asked every quarter:

1. What specific knowledge does your team need right now to improve its decisionmaking and its ability to adapt and catalyze?
2. What specific knowledge does your team need right now to enhance external wisdom and impact in our program fields or related areas of interest?

ABOUT THE McKNIGHT FOUNDATION

The McKnight Foundation, a Minnesota-based family foundation, seeks to improve the quality of life for present and future generations. Through grantmaking, collaboration, and encouragement of strategic policy reform, we use our resources to attend, unite, and empower those we serve. Program interests include regional economic and community development, Minnesota's arts and artists, early literacy, youth development, Midwest climate and energy, Mississippi River water quality, neuroscience, interntional crop research, and community-building in Southeast Asia. Our primary geographic focus is the state of Minnesota, with significant support also directed to strategies throughout the U.S. and in Africa, Southeast Asia, and Latin America.

Founded in 1953 and endowed by William and Maude McKnight, the Minnesota-based Foundation had assets of approximately $2 billion and granted about $86 million in 2013.

THE McKNIGHT FOUNDATION

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