

KNOWLEDGE MANAGEMENT AND JEWISH COMMUNAL AGENCIES

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NEED FOR KNOWLEDGE MANAGEMENT

Only two to three years ago, many management gurus proclaimed that a new social transformation would take place as we moved out of the Industrial Age and into the age of technology and information. Industrial jobs and other traditional forms of work would disappear, to be replaced by the work of technologists and information specialists. Corporations, governments, and organizations in this new knowledge society would be dependent on knowledge workers who would be instrumental in transforming information either into profits or governmental or organizational goals (Drucker, 1994).

This transformation has indeed begun to materialize. In just a few short years, the corporate world has reinvented itself in many ways in order to accommodate this massive change in the world's economy, and it is now beginning to discard many of these recent innovations for even more radical approaches. Most Jewish communal organizations have little understanding of the changed environment and have just started to develop the structures, technologies, and strategies necessary to survive and grow strong in this new technological age. Unfortunately, for many of them it may be a case of too little, too late.

Information is power in this new environment. In the early stages of the development of automated systems, a major concern was ensuring that sufficient data and information would reside and be available to users of this technology. Today, the challenge is to contend with the glut of information available and to turn it into useful knowledge. Any search-engine on the Internet, such as Yahoo, Excite, or Magellan, produces thousands of matches per search phrase. How do you filter this information and make it useful to you?

Based on a paper presented at the Annual Conference of the Association of Jewish Community Organization Personnel, *Changing Roles and Expectations for the Jewish Communal Service Professional*, New York, May 7, 1997

Information is not knowledge unless it solves a problem or meets a need for the organization or its clients. Knowledge is information that makes a difference and has value.

As the knowledge content of our work increases, our ability to capitalize on this knowledge will depend on how well it is managed. Managed knowledge is an organizational asset and can give an organization a differential advantage. Jewish communal organizations can turn to the corporate world for models of knowledge management.

PERSONAL AND ORGANIZATIONAL KNOWLEDGE

The New York Association for New Americans (NYANA) is a resettlement organization with the unique design of housing resettlement services ordinarily supplied by several functional agencies under one roof. These service departments work simultaneously with clients who use most services during their four to six months at NYANA. In 1988, the agency implemented an automated case management/records system to replace the paper system that required each service department to keep a duplicative case file on each client. Under the automated system, all service providers entered both statistical and narrative records of service into a computer terminal on their desks. The computer integrated these records by date of service (not date of entry) into a master case file that could then be accessed by all service providers on their computer screens. This information was on-line as soon as it was entered, thus enabling all workers on the case to understand what services had been delivered and what problems or progress the clients in the family were experiencing as they moved through the service system.

NYANA management was also able to run reports from the system that revealed the strengths and weaknesses of the service system and allowed for constant adjustment. Summary data were also used for agency

planning and by federation for community planning purposes. In this way, the personal knowledge of the individual service providers was gathered by the computer and transformed into organizational knowledge available to all service departments, agency management, and federation planners.

Personal knowledge comes from experience and learning; it becomes organizational knowledge when collected, analyzed, synthesized, and applied to the work of the agency.

INDEPENDENT REALITY OF KNOWLEDGE

In the past, information and knowledge at NYANA were attached to a physical reality, such as a form, paper file, or a manual. Today knowledge can take on a reality of its own detached from any physical reality. Data and information may reside in a computer, but the useful application of the data or information (knowledge) may be virtual and thus detached from the physical wrapper in which it may be stored.

The Department of State, which funds the resettlement of refugees during their first month after arrival in the United States, requires that a 90-day follow-up form (about 12 pages long) be available to government auditors at the national office of the resettlement agency system (HIAS for the Jewish community). This form regurgitates in a different format much of what is already in the record of service. To avoid wasting the time of caseworkers in writing onerous reports and to prevent government auditors from using such reports on a "fishing expedition" NYANA placed a dial-up computer terminal in the HIAS office. This terminal could call up data already in the case file at NYANA and reconfigure it on a screen in the format of the State Department's 90-day report. Thus, the information would technically "be available" at the office of the national agency if and when an auditor chose to look and entered specific case numbers.

TACIT KNOWLEDGE AND DIVERGENT (DECENTRALIZED) KNOWLEDGE MANAGEMENT

Personal knowledge is often tacit knowledge or useful information that workers and man-

agers do not realize they command. Explicit knowledge is knowledge that they know they have. A major task of knowledge management is making tacit knowledge more explicit.

For an organization to use more of what people know, it is necessary to create vehicles to transform tacit knowledge into explicit knowledge and private knowledge into public knowledge. The quantity of knowledge is not as important as the flow of knowledge.

Divergent knowledge and information management systems can serve to gather and make public tacit and private personal knowledge. These types of systems gather information from the bottom up, which is not verified or codified, and allow for the free offering of knowledge by individual staff. For example, F.E.G.S. has relied heavily on e-mail applications as divergent knowledge management technology, the New York UJA-Federation has begun to explore the possibilities of an intranet, and NYANA had developed an extremely successful approach using groupware.

Over 18 months ago, NYANA developed its first groupware application using Lotus Notes as a development platform. The application runs on a PC network that serves over forty management staff. It comprises a series of "project" databases made up of documents rather than data fields. These "electronic project file cabinets" contain documents related to work done by the management team at NYANA on a project-by-project basis. Documents that are generated internally, such as memos, reports, and proposals, as well as documents received by the agency—correspondence, grant awards, audit reports, and the like—are filed in ascending chronological order within the project databases. In addition, comments, updates, phone messages, and action requests relating to each of the team members' work on the projects are entered into the databases. All specific personal knowledge is thus made public to the entire management team on an automated system that is available 24 hours per day and is accessible through dial-up networking from any part of the world.

This software allows the executive and administrative staff of NYANA to engage in

information sharing, conferencing, decision making, and personal analysis regarding all of the work of the management team. This application has eliminated hours of face-to-face meeting time and reams of paper formerly used to copy and distribute work-related documents. In addition, through its remote access capabilities, "Notes" has made it possible to gather and disseminate the individual and collective knowledge of the agency's management staff even when some are traveling or telecommuting. These benefits have been documented by one recent study: "A 1994 study of sixty-four companies, government agencies, and nonprofit organizations using Lotus Notes found that, even using conservative assumptions, the average organization earned a three-year return on its investment of 179 percent, much of it attributable to reduced cost and time of internal communications and improved tracking and administration of projects" (McCready & Palermo, 1994, pp. 4, 9).

The rise of the knowledge worker has also changed the nature of work and of management. Managers today require more interpersonal, leadership skills than supervisory skills. The PC network and knowledge databases, have made organizations more democratic and have diminished the importance of hierarchies, since information is shared so widely. Informal social networks or webs arise to use personal and tacit knowledge (Stewart, 1997).

At NYANA, our Lotus Notes application and Lotus Notes E-Mail have helped downsize and flatten the organization by creating a situation in which all executive, middle management, and administrative staff have access to and input into all management activities.

ORGANIZATIONAL KNOWLEDGE AND CONVERGENT (CENTRALIZED) KNOWLEDGE MANAGEMENT

Organizational knowledge assets are based on the transformation of tacit, private knowledge into explicit, public knowledge. Convergent knowledge management systems are top down and based on knowledge gathered from individuals in the agency that is then verified and codified by the organization.

NYANA is now writing a Notes-based software application based on a convergent knowledge management strategy that will include a "Best Practices in Management" database; a database of our personnel policy code and financial directives; an electronic operations manual; the "NYANA Yellow Pages," which will link people in the agency who need specialized knowledge to people in the agency who may have such knowledge; libraries of relevant resource material; and other features oriented toward making knowledge work for our agency.

CONCLUSION

New technology has made it possible to create, capture, and distribute knowledge in a way that was not previously possible. Corporate models of knowledge management are available to assist Jewish communal agencies move into the year 2000. Most companies in the private sector have adopted the powerful metaphor of the "learning organization." Jewish communal agencies should implement the strategies associated with capturing and leveraging knowledge in order to learn and change based on experience. Inside our own agencies and organizations is "a vast treasure house of knowledge, know-how and best practices" (APQC, 1996, p. 6). Knowledge management—the process of collecting, analyzing, distributing, and integrating internal knowledge and best practices—is the key to capitalizing on our own knowledge resources as we face the changing environments and situations of the new millennium.

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