



KMEF Communiqué 2012

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Second Annual Summit

July 26-27, 2012

The Knowledge Management Education Forum (KMEF) is an on-going dialog to identify and grow consensus on the knowledge management (KM) body of knowledge, competencies, roles and responsibilities, curriculum, and credentialing.

The increased focus on the knowledge age has heightened interest in knowledge management as a professional area of practice. It has also raised questions about the educational foundation needed to support the profession. There is no consensus on what comprises a professional education and training in KM.

The purpose of the KMEF is to create an environment in which a consensus can evolve. It brings together the current and past thought leaders in the field of KM to discuss their work and to open the dialog where others can contribute, with the ultimate goal of defining KM as a discipline.

KMEF was launched in March 2011. Seven webinars were followed by the first Annual Summit, an in-person event held at George Washington University. The Summit was attended by close to 100 knowledge management academicians and practitioners. Video of the Summit is available at <http://kmef.iwiki.kent.edu/KMEF+On+Site+Event>.

The 2011 on-site event at George Washington University gave rise to four Communities of Practice:

1. **Functions Community of Practice (Led by: Ed O'Neal & Dean Testa)** – What strategic roles and responsibilities do knowledge professionals play in organizations today – across all sectors of the economy?
2. **Competencies Community of Practice (Led by: Michael Stelzer & Ellen Ensel)** – What competencies do today's knowledge professionals need to lead knowledge organizations in the 21st century?
3. **Curriculum Community of Practice (Led by: Denise Bedford & John Lewis)** – What are the core and elective elements of a knowledge management curriculum for the 21st century?
4. **Certification and Credentialing Community of Practice (Led by: Douglas Weidner & David Griffiths)** – How can we support these competencies in professional training, at the certificate level, the bachelor's, master's and Ph.d. levels?

The Second Annual Knowledge Management Education Forum continues the dialog starting with reports from the three Communities of Practice (Functions and Competencies made a decision to combine the two Communities of Practice into one) and a review of the 2011 Communiqué. The 2012 KMEF on-site event was working sessions where attendees built consensus on the work of the CoPs. In addition, during 2011/2012, two additional questions surfaced which were discussed. The two questions are:

1. What challenges must be addressed in establishing a KM program in an academic institution?
2. What aspects of KM should be considered for standardization, certification and credentialing?

2012 KMEF WEBINARS (Progress to Date): Available online at <http://kmef12.iwiki.kent.edu> are listed below.

Date	Webinar
Session 1: (March 27, 2012)	KMEF 2011 Recap and 2012 Agenda Dr. Annie Green, George Washington University, Keane Federal Systems, Kent State University
Session 2: (April 3, 2012)	KM Curriculum Community of Practice - Report on Progress Dr. John Lewis, Dr. Denise Bedford, Goodyear Professor of Knowledge Management, Kent State University;
Session 3: (April 10, 2012)	KM Business Functions and Competencies Community of Practice – Report on Progress Ellen Ensel, U.S. Institute of Peace; Michael Stelzer, Knowledge Management Services, Ed O’Neal, Shell Oil Company; Dean Testa, Goodyear Tire and Rubber Co.
Session 4: (April 24, 2012)	Open Discussion of Coverage and Gaps - Business Needs and Educational Options Open Community Discussion
Session 5: (July 17, 2012)	Academic Challenges for the Knowledge Management Profession Dr. Denise Bedford
Session 6: (July 24, 2012)	Wrap Up and Invitation to On-Site Event Dr. Annie Green

Opening Remarks and Welcome - *Dr. Annie Green*

The KMEF 2012 was opened with a welcome to all who attended and a restatement of the goal of the KMEF. The agenda for day one was modified such that the working sessions would be conducted in sequential order versus in tandem.

Functions and Competencies Community of Practice – Working Session - *Michael Stelzer*

Initial discussions were focused on categories of KM roles, which were eventually labeled K-Series Categories, or KM Classification and Job Grading System. Consensus was reached on the below four categories:

1. Strategic (Transforming)
2. Business Aligned (Domain Knowledge)
3. KM Specialist
4. Universal (Knowledge Worker)

The attendees in the working group then discussed the roles that would align with each K-series category and a decision was made to develop a straw man. Table 1 provides the results of the role discussion.

Table 1: K-Series Categories/Classification and Job Grading System

Classification and Job Grading Category	Position/Role <i>(This is not an implied title, companies can provide titles that align with these positions/roles)</i>	KM Specialty (function) Area
Strategic (Transforming)	Chief Knowledge Officer (CKO)	
	Chief Learning Officer (CLO)	
	Chief Knowledge Strategist (CKS)	
Business Aligned (Domain Knowledge)	Functional KM Manager	
	Functional KM Specialist	
	KM Evangelist	
KM Specialist		
	KM Manager	
	KM Specialist	<ol style="list-style-type: none"> 1. Business Intelligence 2. Business Process Management 3. Change Management 4. Collaboration 5. Communities of Practice 6. Computational Linguistics 7. Content Management 8. Decision Analysis and Support 9. Design of Physical Work Environment 10. Document Management 11. Records Management 12. Expertise Management 13. Innovation Management 14. Intellectual Capital 15. Knowledge Architecture

Classification and Job Grading Category	Position/Role <i>(This is not an implied title, companies can provide titles that align with these positions/roles)</i>	KM Specialty (function) Area
		<ul style="list-style-type: none"> 16. Knowledge Asset Management 17. Knowledge Audits and Inventories 18. Knowledge Discovery 19. Knowledge Economics 20. Knowledge Embedded Business Processes 21. Knowledge Exchange 22. KM Leadership and Strategy 23. Knowledge Organization System 24. Knowledge Philosophy and Ethics 25. Knowledge Representation and Engineering 26. Knowledge Society 27. Organizational Communications 28. Organizational Culture 29. Organization Design 30. Organizational Learning 31. Organization Network Analysis 32. Personal Knowledge Management 33. Project Management 34. Semantic and Knowledge Technologies 35. Social Media and Social Networking 36. Taxonomy & Ontology Development
Universal	Knowledge Worker	** Competencies added to every PD – tied to Personal Knowledge Management (PKM)

The straw man represents the initial brain dump of categories and roles to be considered in defining functions/roles/responsibilities/competencies necessary in KM programs/initiatives. The group also came to a consensus on the position levels and career paths associated with the K-Series position/roles. Each position/role has a four level hierarchy as follows:

1. Entry level
2. Journeyman level
3. Senior level
4. Expert level

The straw man needs to be expanded to define responsibilities and competencies (knowledge, skills and abilities (KSA's)) for each position/role that can evolve into position descriptions for industry.

Functions and Competencies Community of Practice - Next Steps

1. Identify, Define and Document Responsibilities of Positions/Roles
2. Develop draft of competencies for others to review/consider (OPM, AIIM, HR Org, etc.) -
- Identify, Define and Document Competencies (*KSA: Technical and Behavioral*) of Positions/Roles
3. Define and Document Position Descriptions for KM
4. Refine Role Classifications (Job classification OPM Model/Other for KM Series) -- Justify Series – Seek Guidance from outside person (consultant) OPM Guidelines, Jim Lee and KM World...etc.
5. Establish a Business Case for KM Series – Cover Path, “Why Do This?”, “What is expert-level K vs. others?”
6. Engage External Groups: FOSE 1105 11/28 – 11/29, Douglas Weidner Advisory Board
7. Establish Visibility – Bill Brantley, Marion Georgieff
8. Conduct Webinar KMEF 2012 – September 12, 2012 Conduct Survey - Refine survey, as appropriate (new data collection, update annually)
9. Package and Publish results - Develop Communiqué (December, 2012)

Curriculum Community of Practice – Working Session - Dr. John Lewis and Dr. Denise Bedford

Discussions in this session were focused on engaging other universities with KM programs. It was felt that the survey provides the status of current curriculums, however until the KM functions/roles/competencies are defined; it would be difficult to define a curriculum that meets the current needs of industry.

Curriculum Community of Practice - Next Steps

1. Continue to identify existing curriculums that exist at universities with KM programs.
2. Engage Universities to become involved in the KMEF.
3. Consolidate and compare existing curriculums

4. Conduct Webinar KMEF 2012 – September 19, 2012
5. Conduct Survey - Refine survey, as appropriate (new data collection, update annually)
6. Package and Publish results - Develop Communiqué (December, 2012)

Credentialing and Certification Community of Practice - Working Session - Douglas Weidner

Open discussion centered on Douglas Weidner’s 2011 “Roles & Responsibilities Model” (Figure 1) and a consensus was achieved that this model closely aligns with the categories and positions/roles proposed by the Functions and Competencies CoP. This model should be expanded (Figure 2) to enable alignment and standardized terminology with the KM functions and roles and a maturity concept added. It was also recommended that a four-dimensional graphical view, top-view versus pyramid profile, be created to provide a visual of the model’s alignment with the four categories.

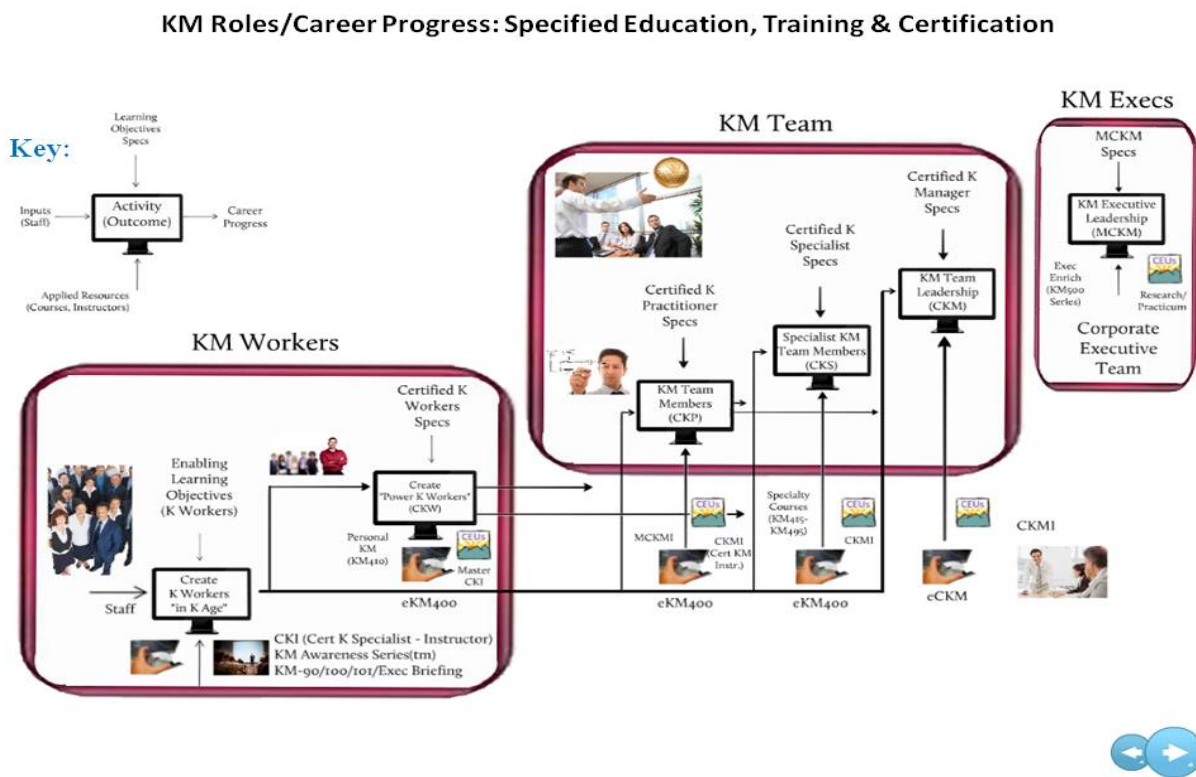


Figure 1: KM Institute Roles & Responsibilities Model

For KMEF’s kickoff Conference in 2011, the **KM Institute** addressed a challenge to develop a much needed “**Roles & Responsibilities Model**” for the KM profession going forward, and a **presentation tool** that enables self-developed, highly complex models, that are not suitable for PPT.

The intent was to be able to define roles and responsibilities, associated skills and competencies, and the requisite education and training/certification to qualify individuals for leadership roles in the Knowledge Age. Though we are a leading KM certification trainer, we know that both education and training are complementary, not directly competing alternatives. We presented a model using **Prezi** (www.prezi.com) that we developed internally. It depicts the many roles within a K-based organization. The power of Prezi is the ability to zoom in on objects. Let's just review the **"Key"**.

- **'Monitor' Object** – was meant to be an individual position or **role**, say **CKO**. It is one of many possible objects.
- **Left Input Arrow** – Possibly the desired **Qualifications** for the role.
- **Top Input Arrow** – Possibly the **Learning Objectives**, but one could 'zoom in' (drill down) to the underlying skills/competencies.
- **Bottom Input Arrow** – Courses: both academic courses/degrees and training/certifications.

We had a consensus of acceptance for the path we were taking, so we went forward. But, an idea may be one thing, putting it into practice, quite another.

Another topic discussed in this working session was the inclusion of an organizational knowledge maturity model (Figure 2). Much discussion focused on the results of existing maturity models. It was emphasized that current KM maturity models are assessment (diagnostic) tools and that they lack a prescriptive component. The definition of an assessment/diagnostic and prescriptive KM maturity model has been adopted by the Credentialing and Certification CoP.

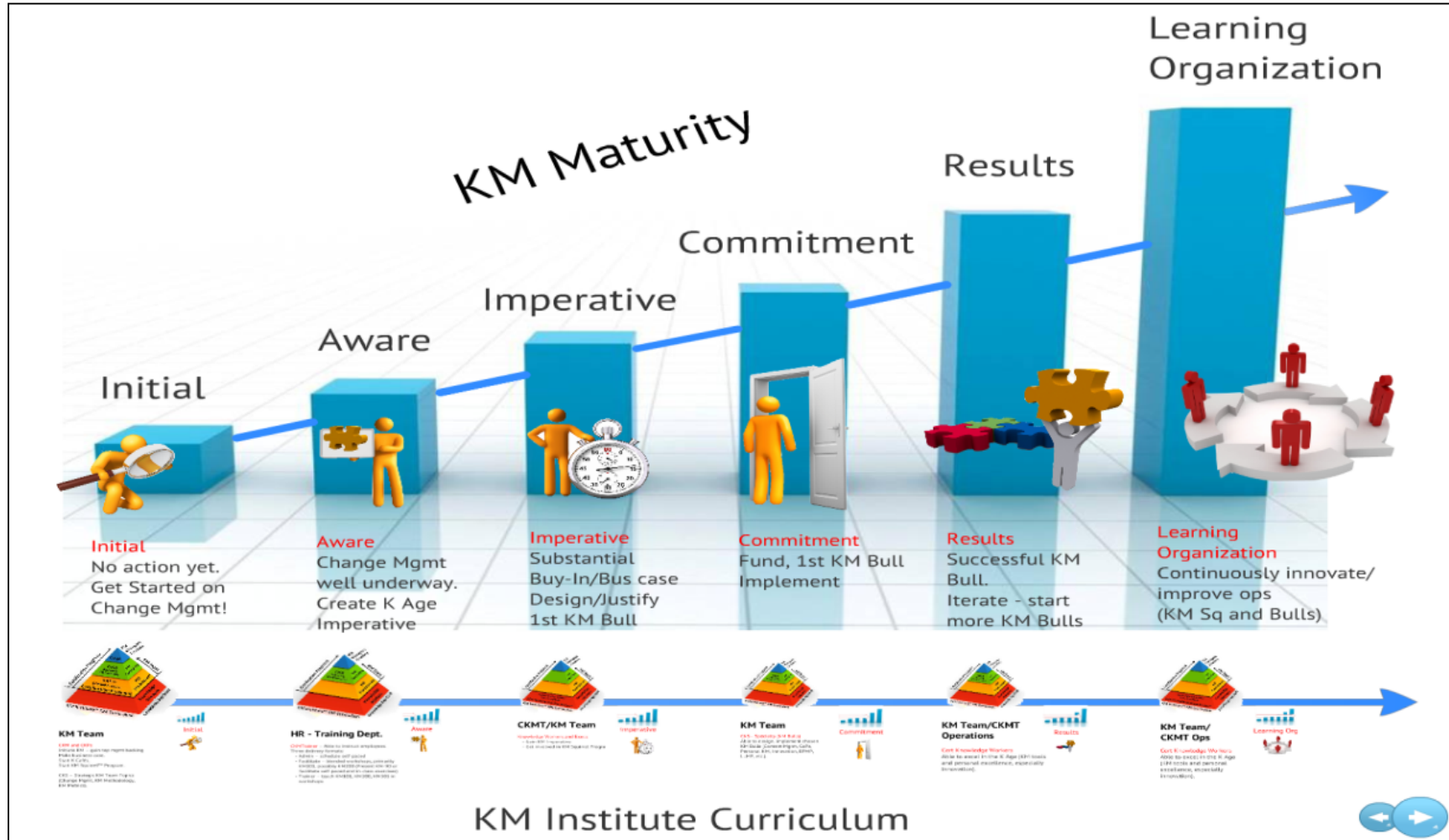


Figure 2: KM Institute Knowledge Maturity Model

A model such as this is needed to add one further dimension or variable – **time**, which translated into the environment of the organization, specifically its KM maturity.

The earliest KM maturity models date to 1999. However, these issues are prevalent:

- Great idea, but **premature** – needed much more understanding of KM, which we now have.
- **Diagnostic Assessment Tools** – Need to be both diagnostic and **prescriptive** – provide a way forward.

Assertion: The types of education and training/certification will vary depending on an organization’s maturity level.

Examples:

- If no KM started or even contemplated, no need for KM expertise, unless to be the **spark**.
- If **KM is commencing** – immediate need for **change management expertise** and at least some **KM awareness**, maybe an in-house Train-the-Trainer Program.
- If KM is **Designing/Justifying** key initiatives, probably KM specialty knowledge required – CoPs, BPMP, LLMP, Innovation, etc.

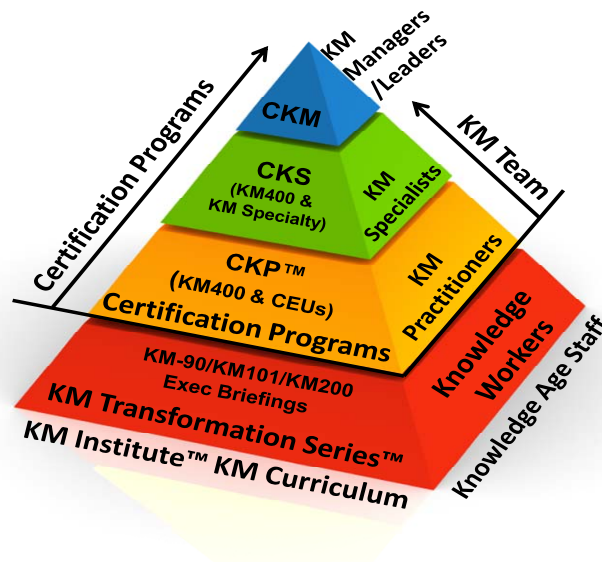


Figure 3: Pyramid (View of Hierarchy 2-sided)

How about the complexity and natural hierarchy of course offerings, whether university degrees or training/certification?

We opted for the **pyramid** as an icon (Figure 3). In our initial design, we used only two sides – **Curriculum (CoP # 3)** associated with **Roles (CoP #1)**. But we anticipated that we might need to invoke all **four sides**, e.g., **Skills and Competencies (CoP #2)**, and **Learning Objectives (CoP #4)**. For that, a top-down aerial view might work best. The CoP will review the draft model. The Pyramid’s four sides are tentatively planned to include: 1. Roles, 2. Skills & Competencies, 3. Job Descriptions, and 4. Education, Training and Certification Levels

Credentialing and Certification Community of Practice - Next Steps

- 1 Align “Roles and Responsibilities Model” to K-Series Categories/Classification and Job Grading System
- 2 Define and synchronize to a common/accepted language in courses/degrees and certifications.
- 3 Infuse a common/accepted language in the hierarchy of categories, roles, skills/competencies, learning objectives and course content.
- 4 Align functions/roles/competencies with credentials and certifications
- 5 Define learning objectives and specific course content
- 6 Map PD’s from several organization to “Roles and Responsibilities Model”
- 7 Assessment Article of KM Maturity Models, benefits, risks, etc.
- 8 Define KM Maturity Model (Assessment/Diagnostic and Prescription) that aligns with functions/roles/competencies
- 9 Conduct Webinar KMEF 2012 – September 5, 2012
- 10 Package and Publish results - Develop Communiqué (December, 2012)

Proposal for a Knowledge Management Center of Excellence

Denise Bedford and Mike Stelzer provided insights into a proposal by Ed O’Neal, Shell Oil Company to create a KM Center of Excellence.

Standardization

There is a need for a Standards CoP. There was consensus by the group that parallel to the existing efforts, there needs to be progress towards standardization of the categories, roles, responsibilities, skills/competencies. There was open decision on what path to take to standardize KM, either Office of Personnel Management (OPM) or Association for Information and Image Management International (AIIM) or simultaneous activity on both.

Other Questions that Surfaced

1. What is the Reporting Structure?
2. What conference programs should KMEF align with?
3. Who are the decision makers?
4. Who is the audience?
5. Who are the top 100 companies w/KM Activity?
6. What Industry Segments are using KM?
7. What are current titles for KM positions/roles?

In the words of **Douglas Weidner**: “I’m encouraged by a famous Robert Louis Stevenson quote we have probably all heard, “*Don’t judge each day by the harvest you reap but by the seeds you plant.*” I think we did some good planting over the last few days, and I thank you for all of the camaraderie we shared.

Closing

All of the content generated by the KMEF is stored, published and made accessible to participants and any others interested in KM through the Knowledge Management Education Forum (KMEF) website (<http://kmef12.iwiki.kent.edu>).

The 2011 KMEF on-site event was video captured by the KM Institute and is available at <http://kmef.iwiki.kent.edu/KMEF+On+Site+Event>

SPONSORS: The KMEF 2012 has been sponsored by Kent State University and George Washington University.

Dr. Denise Bedford

Goodyear Professor of Knowledge Management, Kent State University

Dbedfor3@kent.edu

Dr. Annie Green

Asst. Professorial Lecturer, George Washington University

Principal, Institute of Knowledge and Innovation;

Adjunct Faculty, Kent State University

Knowledge Management Practice Lead, NTT Data, McLean VA

Annie.green@gwu.edu

Thank You!

Please Join the KMEF efforts to make KM a discipline.

Join a KMEF CoP:

1. Functions and Competencies Community of Practice (Led by: *Ed O'Neal, Dean Testa Michael Stelzer & Ellen Ensel*)
2. Curriculum Community of Practice (Led by: *Denise Bedford & John Lewis*)
3. Certification and Credentialing Community of Practice (Led by: *Douglas Weidner & David Griffiths*)