

# Study report: How can humanitarian and development organisations learn, grow, and evolve in fast-changing and complex environments?

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## ***Abstract***

*Humanitarian and development organisations operate in rapidly changing and complex environments where the ability of humanitarian and development organisations to learn, grow, and evolve is critical. Acknowledging these challenges, the authors of this paper analyse the role of knowledge and learning, grounded in the concerns noted by Yanguas (2021) to the “learning hypothesis”, which states that in development agencies, increased knowledge should lead to increased impact. In this context, knowledge management gains significance as it serves as the conduit for utilising both internal and external knowledge to augment organisational performance. At its core, knowledge management can be defined as the process of identifying, organising, storing, and disseminating information within an organisation to improve operational performance and facilitate better decision-making. The findings reveal that improving resource allocation, diversifying learning options, and integrating knowledge management into the organisational culture are critical for addressing institutional barriers and enhancing adaptive capacity in development and humanitarian and development organisations.*

**Keywords:** knowledge management, information management, NGOs, humanitarian aid, international development cooperation, development organisations

## Introduction

In the field of international development cooperation and humanitarian assistance, organisations often work in highly unstable, fast-changing, and complex political, social, and economic environments (Weiss and Hoffman, 2007). The ability of humanitarian and development organisations to learn, grow, and evolve has never been more critical, especially in an era defined by rapid change and complexity.

Knowledge management (KM) stands as a cornerstone for leveraging an organisation's intellectual assets and enhancing their intended impact [\(1\)](#). While related, KM should not be equated purely with electronic data processing. Essentially, KM is about identifying, organising, and sharing information to improve operational efficiency and make informed decisions (IBM, 2023). As noted by Dalkir (2005), KM feeds the valuable lessons learnt and best practices into the corporate memory to foster continued organisational learning.

This research followed the conceptual framework proposed by Pablo Yanguas in his paper: "What have we learned about learning? Unpacking the relationship between knowledge and organisational change in development agencies". Yanguas (2021) controverts a widely accepted tripartite hypothesis on the flow of knowledge within humanitarian development organisations: a) Knowledge leads to organisational learning, b) learning leads to organisational change, and c) change leads to organisational impact. The author focuses his analysis on understanding the causal relationship of hypotheses a) and b).

Yanguas defines organisational learning as "the process by which [they] use knowledge to change their systems, processes, and strategies for achieving their goals, in particular (but not exclusively) more effective developmental performance" (2021, p. 3). Operational learning is understood as processes by which knowledge influences the delivery cycle to refine and adjust interventions to ensure more effective performance against expected results. Strategic learning can be conceptualised as processes by which knowledge influences the objectives, structures and procedures that will govern the design and implementation in the long term. Operational learning is different from organisational learning. It is about gaining deeper operational intelligence about how work gets completed.

The present study focuses on organisational, operational, and strategic learning as per Yanguas' framework. We employed a deductive approach, commencing with the examination of the "learning hypothesis", which was then tested through interviews conducted with members of humanitarian and development organisations. While having a global orientation, the study adopts a targeted lens on the German humanitarian sector, specifically focusing on World

Vision Germany and its expansive network of stakeholders, which includes not only local but also international staff and other NGOs as revealed in the participant demographics.

This paper is based on the data obtained during in a research consultancy commissioned by World Vision Germany. The study aimed to explore the role of knowledge in catalysing learning and driving organisational change in humanitarian and development organisations. Specifically, it attempted to analyse the factors that facilitate or hinder organisational learning, as well as the relationship between operational learning, strategic learning, and organisational change. It also seeks to contribute to the literature of KM within NGOs, particularly in the German context.

The structure of this report is as follows: First, a literature review introduces the concept of KM, its role and development within humanitarian and development organisations, and the identified gaps in the literature. Second, Yanguas' analytical framework is introduced and, third, the methodology and methods used for this study. The fourth part shows the results and findings, divided into the three aspects of KM discussed in Yanguas' work, namely organisational learning, operational learning, and strategic learning. This is followed by the conclusions.

The findings suggest that it is not just the amount of knowledge that matters but also the awareness of its importance, function, and effective management within organisations. Furthermore, it is important to recognise that not all humanitarian and development organisations share identical knowledge requirements. Consequently, they must align their individual resources and objectives internally to ensure a cohesive approach to KM.

## **Literature review**

### *What is knowledge management?*

For this research, knowledge management is understood as the activities related to the capture, use, and sharing of knowledge within an organisation. It involves practices for gaining new knowledge, including the management both of external linkages and knowledge flows within the enterprise, including methods and procedures for seeking external knowledge and for establishing closer relationships with other organisations. Furthermore, KM involves methods for sharing and using knowledge, including establishing value systems for sharing knowledge and practices for codifying routines (OECD, 2005).

The KM process comprises a recurring cycle of three stages: knowledge creation and capture, knowledge sharing and dissemination, and knowledge acquisition and application. The first stage, knowledge creation, involves identifying and documenting new or existing knowledge

to be circulated within the organisation. It could be novel knowledge or new applications of existing procedures, aiming at different outcomes (Dalkir, 2005).

The second stage, knowledge sharing, is the mechanism by which knowledge flows within and beyond an organisation. Factors such as the relationship between the source and recipient, the location and form of the knowledge, and the recipient's learning predisposition affect the success of knowledge sharing. Its success is measured not merely by the act of communication but by the occurrence of organisational learning (Cummings, 2003).

The final stage, knowledge application, focuses on leveraging the acquired knowledge to improve operations and formulate new strategies. In this phase, internal and external knowledge coalesces, which eventually leads to organisational goals being met and pressing problems being solved (Boateng and Agyemang, 2015).

#### *The role of knowledge management within humanitarian and development organisations*

KM holds a pivotal role in various sectors, including the international humanitarian and development cooperation fields (Ganapathy, Mansor, and Ahmad, 2020; Mosoti and Masheka, 2010). Humanitarian and development organisations, such as NGOs, operate in demanding contexts and are faced with the challenge to demonstrate lasting, tangible impact. While these organisations place a premium on learning from their experiences (Core Humanitarian Standard, n.d.), they grapple with the competing imperatives of delivering rapid results and simultaneously reflecting on and updating their methods.

Humanitarian and development organisations rely heavily on the transfer and dissemination of knowledge to facilitate innovation and creativity (Hovland, 2003; von Guretzky, 2001). Whether engaged in fighting hunger or poverty, or offering assistance in education, infrastructure, economic development, environmental issues, or policy advocacy, knowledge is a key resource that powers their activities. Knowledge in this context is not merely confined to facts and data, it also encapsulates the rich and diverse experiences, insights, and expertise gathered from various sources, both global and local (USAID, 2022).

As stated, the role of KM is not limited to knowledge transfer, it also involves the generation, organisation, dissemination, and application of knowledge. As such, KM practices within NGOs are often oriented towards creating an environment conducive to learning and innovation, ensuring that knowledge assets are effectively utilised to inform decision-making and drive organisational effectiveness (Hovland, 2003; USAID, 2022). Following the principle of “do no harm”, NGOs must actively incorporate criteria of diversity—spanning gender, race, class, and culture—into their knowledge processes (Van der Velden, 2002).

Another critical issue in KM revolves around effective knowledge sharing. Humanitarian and development organisations are known for their decentralised, often global, federated, and disparate operations which can make knowledge sharing a daunting task. Von Guretzky points out how these organisations need to negotiate distribution battles for funding, which can lead to conflicting voices within the organisation which, in turn, can hinder the smooth flow of knowledge (von Guretzky, 2001).

Furthermore, the practical challenges of implementing KM practices in complex and often turbulent operational contexts cannot be overlooked. As Guretzky continues to explain, these organisations often face issues related to bureaucracy and specialisation that can stifle creativity and hinder knowledge generation (von Guretzky, 2001). Additionally, there are financial constraints that limit the acquisition of sophisticated KM solutions (Hovland, 2003). To make matters worse, insufficient time for iterative learning is aggravated by the high turnover of staff, impeding the acquisition and application of knowledge and skills (Booth and Unsworth, 2014). Often, the same programmes, despite being inappropriate under the given circumstances, are repeated over and over again. Combined with that, inefficient knowledge management processes can lead to highly qualified workers wasting time looking for needed information, or to essential expertise concentrated in only a few employees, or, finally, to information access being hindered by piles of irrelevant data (Holzer et al., 2016).

The increasing involvement of humanitarian and development organisations in partnerships and networks adds another layer of complexity to KM. It requires effective cross-organisational coordination and communication to manage knowledge across diverse and geographically dispersed entities (von Guretzky, 2001). Therefore, even when KM tools operate as planned, it is not always evident how learning is transferred to partnerships, networks, and other spheres of management to ensure that the acquired knowledge informs decision-making processes (OECD, 2014).

Despite the constant influx of information and the establishment of structures and systems to manage this flow, humanitarian and development organisations and their partners continue to struggle with adapting more effectively and efficiently to the ever-changing trends and inputs into their operations. Often, the programming is not adjusted to the context or not as quickly as specific contexts would require, resulting in interventions which fail to effectively meet the needs of affected communities, partners, and stakeholders (Ramalingam, 2014). The absence of timely and accurate data impedes informed decision-making, while limited funding and resources make it difficult to respond swiftly to emerging needs. Cumbersome bureaucratic

processes and regulations further slowdown adaptability and hinder the ability of humanitarian organisations to provide timely and contextually relevant assistance to affected communities and stakeholders, often resulting in interventions that fail to meet their evolving needs (OCHA, 2018).

### *Knowledge management trends and developments*

Within the realm of KM, the literature reveals a progressive shift among humanitarian and development organisations towards embracing more adaptive and innovative practices. As part of effective KM strategies for achieving their objectives, humanitarian and development organisations have been progressively involved in partnerships and networks, leading to an increasingly collaborative environment (2).

In participatory knowledge management, a key adaptation involves integrating local knowledge (3) into development programming. The view of local communities as active participants and sources of knowledge in the development process not only ensures a bottom-up approach to development but also helps to guarantee the sustainability of programmes (USAID, 2022). It is also becoming a more and more widely shared value commitment resulting from the decolonialisation discourse in the humanitarian and development community.

Beyond the local level, organisations are increasingly networked, fostering a culture of collaboration and transparency. Involvement in partnerships and networks serves as a mechanism to optimise KM, thereby amplifying its impact across organisations (Dalkir, 2011). Additionally, the formation of communities of practice and the emphasis on cooperative learning have long become critical elements in NGOs' KM adaptations (Hovland, 2003; von Guretzky, 2001). Communities of practices (CoPs) became increasingly relevant for humanitarian and development organisations. They can be defined as “groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise by interacting on an ongoing basis” (Wenger, 2002).

Simultaneously, technology's role in transforming KM practices cannot be understated. Meirink, Meijer, and Verloop (2007) point towards the increased use of digital tools and platforms to streamline knowledge sharing and learning processes, which have come to counter some of the obstacles associated with the wide geographical dispersion and decentralisation of humanitarian and development organisations' operations.

*Identified gaps in the literature review*

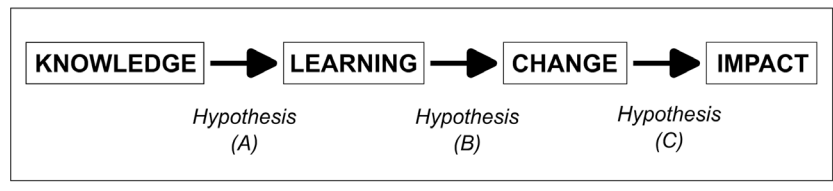
The literature review has brought to light several gaps, indicating areas that require further exploration in the realm of KM within humanitarian and development organisations, particularly in the German context. There is a need for scholarly calls for more empirically grounded studies on KM practices and processes in the humanitarian and development sectors (Riege, 2005; Yousif et al., 2020). Holzer et al. emphasise that “current research literature is still lacking a full understanding of how to encourage users to share knowledge” (2016, p. 3). A significant gap is observed in the availability of studies and material related to KM in German humanitarian and development organisations. The articles reviewed during this research revealed an insufficiency of German authorship and a lack of case studies about German organisations. This is in contrast to the richer literature available in the English-speaking world. Finally, there is a need to further explore the relationship between KM and organisational culture, which plays a significant role in facilitating or impeding KM initiatives, such as knowledge creation and knowledge sharing (Alavi, Kayworth, and Leidner, 2005).

As Fowler (1997) stated:

“The future usefulness of NGOs for the world’s poor will depend on their ability to overcome their learning disabilities. Crudely put, if NGOs do not learn from their experience, they are destined for insignificance and will atrophy as agents of social change. These identified gaps signal opportunities for future research to enrich our understanding of KM in NGOs, particularly in the German context, the exploration of novel KMS [Knowledge Management Systems], and the development of effective metrics for KM evaluation.” (p. 64)

**Analytical framework**

The study employed the “learning hypothesis” presented and critiqued by Yanguas as an analytical framework. Yanguas (2021) posits a tripartite hypothesis on the flow of knowledge within humanitarian and development organisations: a) knowledge leads to organisational learning, b) learning leads to organisational change, and c) change leads to organisational impact.



*Figure 1. The three learning hypotheses (Yanguas, 2021).*

This dissonance between knowledge acquisition and organisational change was noted by Yanguas (2021), who indicated there is a learning gap through limited evidence supporting the idea that knowledge automatically translates to organisational learning and subsequent change. Knowledge management, Yanguas argues, is one of the main drivers of organisational learning, contributing to the link between dynamic capabilities and performance.

Organisational learning can take two distinct forms, namely, operational learning and strategic learning. Operational learning refers to the acquisition of knowledge and competencies about an organisation's day-to-day activities. It involves the methodologies through which knowledge shapes the progression of individual projects, programmes, or activities, evolving within the boundaries set by specific goals and funding. According to Yanguas' (2021) characterisation, operational learning is related to the acquisition of knowledge and skills related to the routine activities of an organisation.

Strategic learning refers to the acquisition of knowledge and skills related to longer-term planning and decision-making in an organisation, including objectives, structures and processes that will delineate the design and implementation of activities. Through strategic learning, development entities can adjust their organisational designs, methodologies, and operations to better chase their institutional objectives. While operational learning focuses on short-term processes, strategic learning covers long-term planning.

Yanguas' discussion is useful for the present study's overarching aim to probe how knowledge management affects change and impact in organisations like World Vision Germany. The "learning hypothesis" and its critique proves particularly valuable for investigating the varying forms of knowledge—tacit, implicit, and explicit—as they are generated, codified, and disseminated within organisations. According to Senge, a learning organisation emphasises continuous learning, systems thinking, shared vision, personal mastery, team learning, and adaptability. These elements together enable organisations to adapt to changing circumstances, identify and solve basic problems, motivate employees to achieve common goals and cultivate a culture of innovation (Senge, 2006).

This research aims to delve into the impact of the knowledge agenda on humanitarian and development organisations, the factors influencing organisational learning, and the interplay between operational and strategic learning. Utilising Yanguas' framework, the authors explored both internal and external sources of knowledge. Internally, we examined how tacit and explicit forms of knowledge enable feedback mechanisms and performance management within the organisation. Externally, we evaluated how knowledge acquired from a variety of



stakeholders, including the broader World Vision network and other NGOs, affects organisational learning and adaptability. This allowed us to test the assumption that increased knowledge will, in turn, boost organisational effectiveness, ultimately contributing to a more nuanced and actionable understanding of knowledge management's role in humanitarian work. Given the often-noted gap between constant information flows and actual organisational adaptability, Yanguas' work offers a critical lens and helps to both identify and rectify this discrepancy.

### **Methodological approach**

This research employed a deductive approach, commencing with the examination of Yanguas' argument, which was then tested through interviews conducted with members of humanitarian and development organisations. It involves moving from the broader to the more specific. The study aims to distil these theoretical orientations into actionable strategies.

Purpose and scope: The research aims to scrutinise the distinct characteristics, dynamics, and components that contribute to effective KM within humanitarian and development organisations. While possessing a global orientation, the study retains a targeted lens on the German humanitarian sector, specifically focusing on World Vision Germany and its expansive network of stakeholders, which includes not only local but also international staff and other NGOs, as revealed in the participant demographics.

Literature review: The literature review covered over 110 sources published mainly between 2000 and 2020. Managed via Zotero, this compendium serves as the basis for understanding the contemporary challenges and emerging strategies in KM.

Data collection: The study attempted to engage a diverse range of stakeholders at all levels of research—from conceptualisation to data collection and interpretation. KoboToolbox was used as the primary platform to host research instruments. The study employed a cross-sectional survey design using a structured questionnaire that included Likert scale questions, yes-or-no queries, multiple-choice questions, and open questions for the semi-structured questionnaire. Following an in-depth literature review, the study included 29 KIIs and 45 online survey submissions from staff of NGOs, with notable contributions from World Vision staff and its global network covering over 20 countries.

Analytical tools: For data analysis, RStudio (4) was employed along with a suite of text-processing algorithms (e.g., text network plots, sentiment and emotion analysis) to extract nuanced insights. Documented data cleaning and validation processes were maintained to ensure the integrity of the findings.

Limitations: During the course of this research, challenges were encountered. These encompassed limited participation from both external partners and German organisations in the study. Specifically, the participation in the online survey was restricted to only two members from external NGOs, while the majority of respondents represented various offices within World Vision, encompassing local, national, and international branches. In the subsequent KIIs, the number of external NGO representatives rose to seven, with an additional participant from an umbrella organisation and one from a political foundation. Efforts were made to broaden the participation scope among external partners; however, due to scheduling constraints and contact issues, diversifying the participant pool proved challenging.

Furthermore, a notable scarcity of relevant literature authored by Germans or pertinent case studies within the realm of knowledge management further compounded these challenges. Consequently, our examination of the knowledge management context in Germany had to rely predominantly on insights gleaned from interviews and external sources, given the limited availability of pertinent literature.

### **Main findings**

In this section we offer an overview of the main results derived from the quantitative and qualitative data collection involving World Vision staff and partners. These findings are categorised into three main facets of this research: determinants of organisational learning, operational learning, and strategic learning reported by participants. The results are structured by first elucidating the fundamental concepts and characteristics of each aspect, followed by an exposition of the interview results, substantiated with practical examples from the literature review to illustrate their validity.

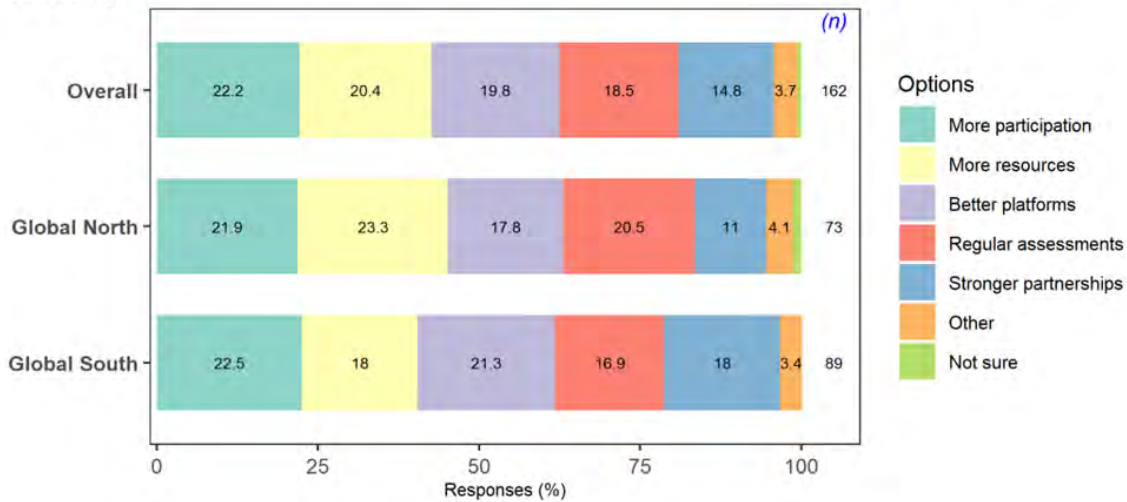
#### *Determinants of Organisational Learning*

As noted by Yanguas (2021), organisational learning within development agencies refers to the process through which these entities harness knowledge to modify their systems, methods, and tactics to realise their objectives (primarily development outcomes). It incorporates both group and individual learning mechanisms, contributing to stakeholders' interests as well as addressing identified challenges.

To examine the process of organisational learning and knowledge management in humanitarian and development organisations, the participants in this research were asked to rate the strategies employed by their organisations to improve their KM processes. Among their responses, despite 24% rating them as 'good', a considerable percentage replied poor (24%) and 'very poor' (18%). When inquired about options for improved knowledge management and learning

processes, the most voted options were ‘more participation’ (22%), ‘more resources’ (21%), and ‘regular assessments’ (20%). Both results combined suggest that participants expect more engagement in learning processes concerning more staff engagement in these processes, more resources in the area, and more consistency in the implementation of these processes through evaluations in their organisations.

**How can your organisation improve its learning and knowledge management practices? (Multiple selection)**



*Figure 2. Optimal approaches to improve learning and KM practices.*

The research asked participants about their organisations’ strategies for promoting a culture of continuous learning and improvement among staff and programmes. Some of the most mentioned practices were regular digital and face-to-face training sessions, reflection groups, workshops, and internal newsletters. This evidence is in line with the results of the online survey for the knowledge management initiatives currently in place in the respondents’ organisations, in which 22% of respondents answered ‘knowledge sharing platforms’ and 20% chose ‘learning events’, suggesting that digital and face-to-face strategies complement each other in organisational learning processes. Other highly favoured options by respondents were ‘monitoring and evaluation systems’ (22%) and ‘communities of practice’ (18%). This shows that the content generated by monitoring and evaluation materials is relevant to organisational learning and that communities of practice, that is, face-to-face contact for group teaching and learning, are also part of organisational learning processes.

Expanding upon the evaluation of organisational learning strategies, several common strategies emerged among the insights from the KII responses. Some of the most mentioned practices were regular digital and face-to-face training sessions, groups of reflection, workshops, and internal newsletters, as shown in the answer below:

“We actively engage in reflecting on various processes such as project proposals, lessons learnt, and project management processes, for example, from our experiences. We also invest in reflection sessions, as exemplified by one of our projects in Ukraine where we focused on understanding the sentiments and experiences of the people involved. Moreover, we foster a culture of openness by creating spaces for feedback and conducting anonymous surveys to gather insights from the staff. As for learning and professional development, we have a platform called E-campus within WV that offers a wide range of online training[s]. Additionally, on a yearly basis, we engage in performance agreements that include a section specifically dedicated to personal development”. (Institution: WV international staff)

The results indicate three main challenging areas to improve KM of humanitarian and development organisations: the complex and changing environments, policy instruments, and organisational arrangements. They mention significant challenges in the area of KM within organisations, including issues related to KM systems, user adoption, training, and technical limitations. The identified obstacles encompass a lack of user engagement, insufficient support, and technical issues. To address these challenges and improve the use of KMS and tools, the survey participants have chosen the options: ‘provide more training and support for users’ (22%), ‘allocate more resources’ (21%), and ‘improve user adoption and engagement’ (19%). One respondent from WVG stressed the importance of upgrading, integrating, and adapting current systems through a strategic KM plan, aiming for a more automated data-management process, thereby reducing staff effort. Meanwhile, a respondent from WVI underscored the significance of senior leadership being receptive to learning. Based on the results collected from participants, the determinants of organisational learning in humanitarian and development organisations revolve around effective investment in learning and knowledge management, the provision of diverse learning opportunities and the integration of various knowledge management practices. The opportunities for improvement also lie within the same area, with a focus on enhancing learning, leadership, and senior management involvement. In addition to the option of improving KMS and tools, respondents highlighted the importance of higher authorities in implementing effective management strategies to address these challenges affecting their members.

### *Operational learning*

As per Yanguas' (2021) definition, operational learning encompasses the acquisition of knowledge and competencies pertaining to an organisation's day-to-day activities, such as project implementation. In the context of this study, participants in the online survey and KIIs were requested to furnish insights into their present operational learning processes and their efficacy.

In response to the KII question regarding the role of implementing partners in data gathering, management, learning, and change, the importance of these partners in collaborative organisational efforts has been confirmed. The responses brought several key points, with capacity building emerging as the most frequently mentioned aspect. Many respondents emphasised the significance of capacity building in collaboration with partners, especially for local organisations and communities.

“We have a federal structure; the partners are trained by country offices and are also trained in KM. We do capacity building for local organisations. In the end, it even goes down to the community level, where capacity building is also done.”

(Institution: World Vision local staff)

The question also sought recommendations for enhancing this role to bolster data quality and facilitate organisational learning. The responses brought several key points, with the provision of capacity building to implementing partners emerging as the most frequently mentioned aspect. Many respondents emphasised the significance of capacity building in collaboration with local partners, especially for implementing local organisations and target communities.

Trust and collaboration between implementing partners and organisations were also highlighted as vital elements along with the need for sufficient resources to support their role effectively.

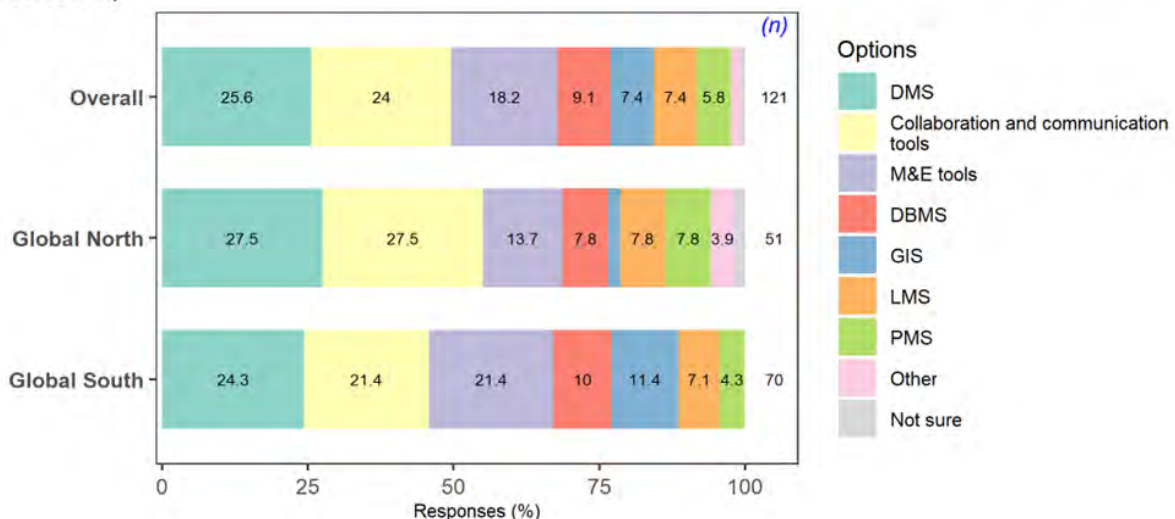
“I don't treat the implementation partners locally any differently from the WV team. We're all in this together. Any opportunity given to the WV team is also given to other partners. We don't select the WV team first and then the local partners, we do everything together.” (Institution: WV international team)

Likewise, interviewees mentioned some demands, including the need for more clearly defined expectations and standardised guiding principles applicable to all implementing partners, with the aim to emphasise the imperative of sharing data in a manner that benefits recipients without compromising their safety and security:

“In regard to engaging with implementing partners, I think it’s far from perfect but again it’s a bit hard to think of something standardised because of those differences in the context. What we can do is have some guiding principles that can be used for all implementing partners, and these guiding principles will be like that it is necessary to share the data with the people where they can benefit from it in a way that would not compromise their safety and security.” (Institution: WV staff)

In the context of operational learning, an important aspect to assess is regarding KMSs which are being used in the studied organisations. It was reported that document management systems (DMS), collaboration and communication tools, and M&E tools were the most chosen knowledge management systems or tools used by organisations, totalling 69% of their choices. The other ones, such as Geo-referenced Information Systems (GIS), Learning Management Systems (LMS), Database Management Systems (DBMS), and Project Management Software (PMS) had less than 10% of choice. These tools, which require greater knowledge or specialisation on part of the organisation’s staff, suggest that they have not yet been introduced efficiently. These results suggest that to improve learning and knowledge-transfer processes, one way would be to train the staff on more specific KMS, in order to provide them with a wider approach to the collection and management of knowledge.

**If yes, what type of knowledge management system or tool does your organisation use? (Multiple selection)**



*Figure 3. KMS and KM tools are most used by the assessed organisations.*

Another relevant aspect to analyse is how organisations select and use various tools to collect and manage data, especially when they operate in different geographical regions. When asked, ‘If any, what are the main tools your organisation uses to collect data, including their pros and cons?’, Excel, KoboToolbox, and Zoom emerged as the most frequently mentioned tools for

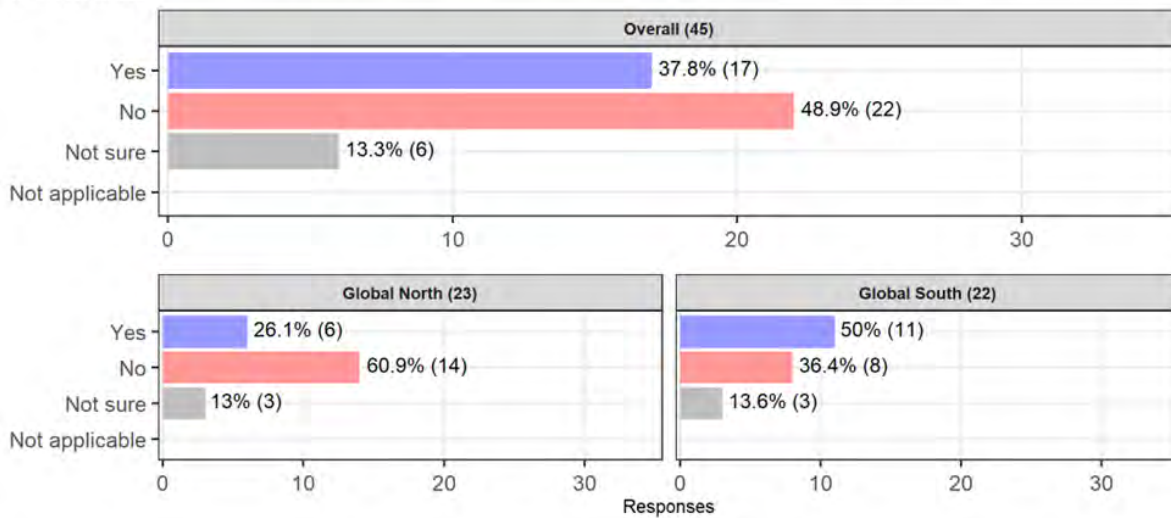
data management, M&E, and collaboration and coordination, respectively. Besides technological tools, the KIIs identified various collaboration mechanisms as essential tools for KM practices. These mechanisms include lessons learnt events, communities of practice, and team meetings, which serve as examples of sharing tacit knowledge. When asked about the advantages of using KMS or tools, the survey results were evenly distributed, revealing that no single benefit took precedence; instead, several benefits were considered significant: 'Improved data collection and analysis' (19%), 'Improved decision-making' (19%), 'Improved programme planning and implementation' (19%), 'Improved monitoring and evaluation of programmes' (17%), and 'Increased efficiency and productivity' (16%).

However, the results also indicate challenges and limitations associated with their use. These include issues such as 'lack of user adoption and involvement' (25%), 'insufficient training and support' (22%), and 'technical limitations or problems' (17%). These results justify the survey respondents' opinion of the effectiveness of these KMSs or tools, since 52% considered them 'regular', 24% 'poor', and only 20% 'good'. To address the challenges, participants expressed their preferences through voting, with the following results: 'Provide more training and support to users' (22%), 'Allocate more resources' (21%), 'Improve user adoption and involvement' (20%), and 'Increase personalisation' (20%).

The online survey asked participants to rate the level of support for knowledge management activities in the organisation. Participants shared their assessments, with 33% rating the support as 'regular', 24% as 'good', and only 2% as 'very good'. However, the results revealed a degree of satisfaction, the response rates for 'poor' and 'very poor' show that KM should be prioritised more. These findings corroborate the observation that fewer than 40% of online survey participants have dedicated teams or departments for KM in their respective organisations.

**Does your organisation have a designated knowledge management team or department?**

n = 45 responses



*Figure 4. Percentage of organisations reporting to have a knowledge management team or department.*

Despite the results above, the study revealed interesting perceptions of KM practices among the survey participants. Among the 17 respondents who reported having a KM team, the majority (69%) had a compact team of 1 to 5 employees, and a considerable proportion (23%) had a slightly larger team of 6 to 10 employees. With regard to the frequency of reviewing and updating KM strategies or plans, only 29% of the organisations adhered to a strategy or plan, and approximately 40% of them are unsure whether such plans existed in their organisations. Similarly, the fact that 49% reported not having a KM team or department in their organisation, and 13% were unsure about its existence, reveals the need for improved internal awareness and communication regarding these KM initiatives.

The survey results indicate that only 15% of the organisations interviewed use indicators to measure knowledge management, with a significant number of respondents unsure about this practice (35%). Among the indicators used, the most common is ‘Number of knowledge products developed’ (30%) and ‘Number of successful knowledge transfer events’ (30%), which suggests that knowledge products and events are highly valued and easily disseminated to a wider audience of employees. However, indicators related to staff involvement, such as ‘Number of employees using KM tools and platforms’ (20%) and ‘Number of employees trained in KM’ (10%), seem to be perceived or employed less frequently. The results indicate a notable disparity in the focus placed on easily observable evidence, such as quantifiable KM materials and events, compared to aspects that need continuous monitoring by leadership, human resources, or a designated KM team.



Regarding the effectiveness of the indicators employed, the majority of respondents answered ‘not applicable’ (41%) and ‘not sure’ (27%), again highlighting a lack of awareness regarding KM processes in their work routine. When it comes to measuring knowledge management through indicators, organisations face significant challenges and limitations, as reported by the survey respondents. The two main obstacles are the ‘Lack of clarity’ (29%) and ‘Limited resources for monitoring and evaluation’ (19%). Further analysis of the additional answers highlighted common themes, such as the need for indicator availability, capacity building, data availability, and the importance of reliable indicators.

These obstacles reflect the need for clear and comprehensive indicators, improved data collection and analysis systems, and investments in staff capacity-building to understand and utilise indicators effectively. KIIs confirmed that many organisations, both in Germany and internationally, are in the early stages of integrating formal KM indicator-tracking systems. Respondents suggested various potential indicators, such as the number of knowledge management activities, the percentage of implemented evaluation conclusions, and the number of training and exchange meetings conducted.

### *Strategic learning*

Yanguas (2021) defines strategic learning as the acquisition of knowledge and skills related to longer-term planning and decision-making in an organisation. This type of learning focuses on developing new strategies, policies, and approaches to address complex problems and challenges. It involves analysing data, conducting research, and engaging in dialogue with stakeholders to inform decision-making. While operational learning focuses on short-term processes, strategic learning covers long-term planning.

The results of this study indicate that 30% of the organisations use M&E frameworks, 29% events (knowledge-sharing workshops, lessons-learned sessions, project reviews, communities of practice), and 18% online collaborative platforms for knowledge sharing. 15% indicated that they use after-action reviews. These findings highlight the organisations’ reliance on standard and mandatory knowledge-transfer processes, such as events and M&E reports, and the reduced investment in procedures such as collaborative platforms and after-action reviews. One of the interviewees pointed out that although lessons learnt workshops, webinars, and feedback sessions are being conducted to share data analysis and conclusions, there is a significant amount of information that employees may not be aware of:

“I think we have a lot of information that people do not know about because we have a lot of resources on different platforms.” (Institution: WV Germany)

The main mechanisms ensuring that learning translates into tangible changes based on the results are action plans (32%) and regular reporting (24%). Resource allocation (13%) is the lowest means for that purpose, inferring that a larger portion of these changes is happening through other means rather than by dedicating additional resources.

As part of translating strategic learning into long-term organisational and project practices, a staff member from World Vision International emphasised the importance of using data effectively to improve programming, mentioning a specific tool called ‘Adapt’, which enables mapping and identification of gaps in programme implementation, guiding efforts to address existing challenges. However, the participant acknowledged challenges in implementing multi-sectoral programming due to organisational structures and policies that hinder collaboration and integration:

“Sometimes, our structure and our policies make things challenging to implement multi-sectoral programming, which would really have more of an impact on the issues that we want to see improved.” (Institution: WVI staff)

One relevant aspect of strategic learning is the process of data collection and analysis. Delays in data submission or the delivery of low-quality information by partners present challenges to efficiency, as one respondent highlighted:

“In coordination with our corporate finance department, we receive data information that undergoes filtering and specific actions based on the outcomes of the project, which is quite useful [...] Yet there are instances where the lack of clarity hampers the implementation of new processes [...] Challenges arise also when some partners experience delays in data submission or deliver low-quality information, which ultimately hampers our efficiency.” (Institution: WV Germany)

The survey revealed that organisations face significant challenges in translating learning into changes in organisational and project practices. The most prominent obstacles identified were limited capacity for translating learning into practice (29%) and limited resources for implementing changes (25%). Additionally, resistance to change among staff and partners (17%) and a lack of buy-in from senior management (13%) were noted as significant challenges.

What are the main challenges or limitations your organisation faces in translating learning into changes in organisational and project practices? (Multiple selection)

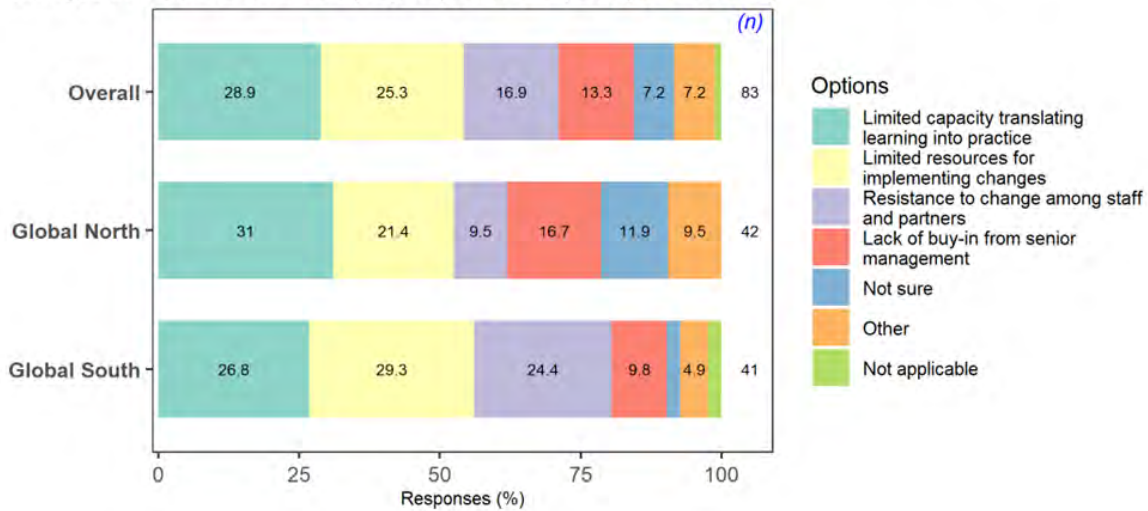


Figure 5. Predominant barriers faced by organisations in the process of implementing organisational and project changes through learning.

Respondents highlighted three main opportunities for improvement: increasing staff capacity (29%), enhancing the skills and knowledge of staff members, particularly in communication and collaboration (27%), and developing better feedback mechanisms (24%). These findings indicate that organisations struggle to apply acquired knowledge effectively due to constraints in capacity and resources. The survey respondents emphasised the need for capacity building and improved internal communication and feedback mechanisms to address these challenges. Fostering a culture of continuous learning, where organisations encourage their employees to continually acquire new knowledge, skills, and insights relevant to their roles and the organisation’s goals, and open communication with the practice of creating an environment where employees feel comfortable expressing their thoughts, ideas, concerns, and feedback openly and honestly, are seen as essential to better utilise knowledge and achieve successful practices.

KIIs further elaborated on these challenges, mentioning the multiplicity of platforms and tools, lack of donor coherence in data requirements, and continuous staff turnover as hindrances to effective knowledge management. Respondents pointed out that a lack of a knowledge management culture, focusing solely on data and information management rather than tacit knowledge, and limited spaces for reflection and dialogue with stakeholders contribute to the challenges. There is also a perception of a disregard for the capacity for analysis and reflection among different participants in the implementation chain. Staff fluctuations and limited time for iterative learning were recognised as bottlenecks in acquiring in-depth knowledge and

applying skills in the development sector. Despite these challenges, some respondents acknowledged the role of written policies in assuring staff performance, although they recognised the time required to familiarise new staff with these policies and project-specific particulars.

“The policies are binding for every kind of organisation for all the field offices. So even if people are leaving, the new one can still have a look at the policies which are binding for the time being, and check and read through and make themselves familiar with it.” (Institution: WV Germany)

Based on the collected data, despite the efforts to integrate data and programming in strategic learning, challenges related to organisational structures, unclear processes, and data quality persist. The process of data analysis can be hampered by lack of clarity and subsequently poor decision-making, delays in data submission, or the delivery of low-quality information by partners.

## **Discussion**

This empirical research has undertaken an extensive examination of organisational, operational, and strategic learning, exploring the KM paradigms within the humanitarian and development organisational sphere. Anchored within the precincts of the German humanitarian sector, with a particular emphasis on World Vision Germany and its network, the study has sought to determine the factors, constituents, and challenges linked to KM practices. The findings of this research lead to an examination of how well practical observations align with the “learning hypothesis” discussed by Yanguas.

On organisational learning, evidence shows that the key factors that determine the progress from knowledge to impact include resource allocation, diverse learning avenues, and seamless integration of knowledge management practices into organisational culture. Consistent training sessions, interactive reflection groups, engaging workshops, informative newsletters, and effective digital platform utilisation are considered the main strategies to cultivate a culture of continuous learning. Finally, the results stress the importance of valuing and utilising local humanitarian knowledge, which enables organisations to better understand local needs and priorities, resulting in more informed and contextually relevant humanitarian responses and improved outcomes for affected communities.

Evidence indicates the importance of creating a conducive environment for effective KM, focusing on factors like organisational culture, leadership involvement, and the capacity to translate knowledge into practical applications. Organisational culture stands out as highly

relevant for organisational learning. The findings are coherent with the literature about organisational culture. For instance, Riege (2005) has argued for a knowledge-sharing culture that encompasses motivation, open organisational structures, and the use of modern technology as key factors for successful knowledge-sharing and improved competitiveness. Alavism, Kayworth, and Leidner (2005) noted that organisational culture plays a significant role in facilitating or impeding knowledge creation and sharing, highlighting the importance of identifying and encouraging KM leaders who value expertise and collaboration as well as the role of top management in legitimising and empowering these leaders.

The category of operational learning was reported to be facilitated through various knowledge management tools such as document management systems, collaboration and communication tools, monitoring and evaluation tools, and database management systems, chosen based on the organisation's resources and culture. The involvement of implementing partners plays a key role in capacity building, and the use of indicators to measure the impact of knowledge management helps to improve decision-making and transparency.

The main knowledge management challenges identified within operational learning include problems with knowledge management systems, resource constraints, difficulties in translating knowledge into practical applications, and challenges in measuring effectiveness through indicators, indicating a dichotomy between the importance of its use and the challenge of its incorporation into the operations of participant organisations. Organisations generally do not have formalised systems for monitoring knowledge management, which leads to ad-hoc practices and a lack of structured indicators. To enhance knowledge management processes, the study found that developing standardised KM indicators and investing in staff training to ensure a shared understanding is recommended and might lead to greater impact of knowledge management initiatives. In addition, challenges exist in promoting awareness and engagement across different departments and teams within organisations. Therefore, creating a culture of knowledge management and ensuring senior leadership involvement is seen as necessary for addressing these challenges and establishing a successful KM culture. Further opportunities for improvement lie in the areas of internal communication and collaboration, and developing better feedback mechanisms to promote a culture of continuous learning.

Strategic learning emerges as fundamental in humanitarian development planning and decision-making, emphasising the need for more comprehensive approaches beyond monitoring and evaluation frameworks. There is a predominant reliance on M&E structures and events for knowledge transfer, with limited emphasis on after-action platforms and

analysis. Organisations translate learning into concrete changes mainly through action plans and regular reporting, while resource allocation is used less for this purpose. Participants emphasised the need to improve data management systems and promote a learning culture to optimise the use of knowledge and its impact.

The study highlights the role of donors in shaping knowledge, learning, and change within the international cooperation domain. It points out that donors often prioritise risk-averse approaches and quantifiable outcomes, which can hinder innovative practices and holistic learning. The study suggests that donors should adopt more flexible funding methodologies and politically informed approaches to foster adaptability and collaboration with local partners. Stakeholder interviews emphasised the complex nature of this relationship, with many donors showing a preference for proven, evidence-based methods and a focus on measurable, often quantitative, results. This preference for tangible, numerical impact metrics can sometimes hinder holistic learning and adaptation, as it may not fully take into account local realities. Donors' risk-averse tendencies and the need for quick action in humanitarian contexts further contribute to the tendency to replicate known strategies, limiting innovation. Donors have the opportunity to adopt more flexible funding methodologies that encourage experimentation and innovation.

Participatory policy-making, institutional reform, and a focus on legal mandates can increase organisational effectiveness, as they help organisations operate more responsibly within the framework of the law. It ensures that their actions are in line with legal requirements, which can contribute to their long-term success and sustainability. Establishing learning and sharing as a global priority can promote knowledge sharing and collaboration, fostering a culture of continuous improvement and adaptation within organisations. Future research should delve into the development and implementation of standardised knowledge management frameworks and indicators and explore the impact of donor practices on organisational learning and knowledge management in the context of international development cooperation.

This paper contributes to the claim made by Yanguas to make evidence-based arguments for the relationship between knowledge, learning, and change. For Yanguas (2021), it remains challenging to determine whether humanitarian and development organisations generally undergo a process of moving from knowledge to impact. The author assumes that there is inadequate substantiation to affirm the causal assertion that knowledge directly results in learning (Hypothesis A) and subsequently leads to organisational transformation within development agencies (Hypothesis B). However, in this research, it was observed that

knowledge does instigate a process of organisational learning, but that it does not automatically lead to rapid organisational transformation. Given these results, these research findings partly support the veracity of the “learning hypothesis”. For this to happen, organisational changes need to manifest themselves promptly, from the evolution of processes, strategies, and organisational responses. As reported in this research, the amount of knowledge collected by the humanitarian and development organisations interviewed needs to be better known and structured holistically by the organisations, both through internal processes for engaging in knowledge management activities and through the inclusion of knowledge management systems.

It is imperative to recognise that the nonlinear nature of humanitarian and development work can overshadow the linear dynamics outlined by the “learning hypothesis”. We advocate for further research and exploration of this phenomenon, seeking to uncover the practical obstacles and strategies to ensure the effective transmutation of knowledge into transformational organisational change and, ultimately, manifest organisational impact. It is true that the organisations interviewed are striving for effective KM, but this effort still needs to be understood and practised by all areas of the organisation, not just one dedicated to knowledge management.

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## Endnotes

(1) Impact can be defined as “the extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level effects. Impact addresses the ultimate significance and potentially transformative effects of the intervention. It seeks to identify social, environmental, and economic effects of the intervention that are longer-term or broader in scope than those already captured under the effectiveness criterion. Beyond the immediate results, this criterion seeks to capture the indirect, secondary, and potential consequences of the intervention. It does so by examining the holistic and enduring changes in systems or norms and potential effects on people’s well-being, human rights, gender equality, and the environment.” (OECD (2023) Evaluation criteria, <https://bit.ly/3I7rNtq>)

(2) Examples of these networks are the ALNAP (Active Learning Network for Accountability and Performance in Humanitarian Action), the Core Group, and ELRHA (Enhancing Learning and Research for Humanitarian Assistance).

(3) Local knowledge, as defined by UNESCO, refers to the understandings, skills, and philosophies developed by rural, indigenous, and local communities with long histories of interaction with their natural surroundings, informing decision-making about fundamental aspects of day-to-day life. (Local and Indigenous Knowledge Systems)

(4) RStudio is an integrated development environment (IDE) for the R programming language. R is a popular open-source programming language and environment for statistical computing and data analysis. RStudio provides a user-friendly interface that enhances the productivity of R users by offering various features and tools for writing, running, and debugging R code.

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