

CHEMONICS INTERNATIONAL INC.

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Excellence, Inc. Launch Technical Support

Final Report
20 February 2005

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Abstract

This report summarizes the achievements and progress made in the completion of this consultant's scope of work related to the launch of Excellence, Inc.

Table of Contents

Data Page.....	ii
Abstract	iii
EXECUTIVE SUMMARY	1
CONSULTANCY OBJECTIVES AND DELIVERABLES.....	2
Annex 1: KM Criterion Presentation Outline	4
Annex 2: Criterion Gap Report	9
Annex 3: KM Requirements Checklist.....	27
Annex 4: Toolkit Master List	32
Annex 5: Material for Brochure	39
Annex 6: Material for Website	53
Annex 7: Strategic Planning Service Framework.....	68
Annex 8: JGATE Assessment Report	75
Annex 9: The Business Value of Knowledge – Presentation Outline	81
Annex 10: KM Mapping – Presentation Outline	92

EXECUTIVE SUMMARY

This report and its annexes demonstrate the consultant's role in helping to launch Excellence, Inc. (EXI) as an independent, non-profit organization. The consultant has assisted in implementing EXI's business plan by participating in drafting the marketing strategy, launching the website, producing branded printed material, producing training material and consulting tools for the knowledge management criterion, assessment and visits to clients, and designing the strategic management facilitation service. The consultant has become familiar with the excellence criterion, sub-criteria and factors for knowledge management and added tools and training presentations to enhance the criterion.

CONSULTANCY OBJECTIVES AND DELIVERABLES

OBJECTIVE:

The objective of this consultancy is to understand and refine Excellence, Inc.'s criteria, services, systems, technical tools, marketing strategy, and products in order to launch Excellence, Inc. immediately once it becomes established as a legal entity.

DELIVERABLES:

- I- Training material, case studies and consulting/assessment tools and their preparatory notes for the Knowledge Management (KM) criterion, in addition to any plans or reports on activities that are related to the areas of expertise.
 - 1- Participating in developing Excellence, Inc.'s Vision, Mission and Objectives
 - 2- Preparing the consultant file for approval by NAFES (The National Fund for Enterprise Support)
 - 3- Preparing KM Criterion presentation (Annex 1)
 - 4- Preparing KM Criterion gap report (Annex 2)
 - 5- Preparing KM Requirements checklist (Annex 3)
 - 6- Enriching the KM Criterion toolkit by adding tools as included in the Toolkit Master List (Annex 4)
 - 7- Participating in evaluating the proposals for the website
 - 8- Participating in a number of marketing visits including:
 - Ministry of Foreign Affairs
 - NAFES
 - 9- Reviewing the KM Criterion for Business and Associations and providing comments
 - 10- Leading EXI's efforts to develop material and design for branded material (Annex 5)
 - 11- Leading EXI's efforts to develop material and design for website (Annex 6)
 - 12- Designed the strategic planning facilitation service framework and presentations (Annexes 7)
 - 13- Applied strategic planning facilitation with Jordan Food and Drug Administration (JFDA)

Excellence, Inc. Launch Technical Assistance

II- Assessments and visits to clients with COE teams, and written and verbal reports on these visits.

- Ministry of Information and Communications Technology
- Greater Amman Municipality
- Jordan Water Authority
- Ministry of Industry and Trade
- Ministry of Planning

Participated in conducting two benchmarking assessments at Jordan Institute of Standards and Metrology (JISM) and Jordan Garments, Accessories, and Textiles Exporters' Association (JGATE) (Annex 8)

III- Written proposals for consulting and training interventions that can be executed utilizing experience of consultant.

Preparing and delivering one KM course with an external consultant under the title of The Business Value of Knowledge (Annex 9)

Arranging for knowledge mapping course with external consultant (Annex 10)

Annex 1: KM Criterion Presentation Outline

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OBJECTIVE

Introduce the organization to:

- What Knowledge Management (KM) is,
- What excellence in KM looks like,
- How KM benefits an organization.

AGENDA

- Definitions
- The concept of Knowledge Management
- What an excellent KM system looks like
- How KM fits into the bigger picture
- What is in it for you

FUNDAMENTAL CONCEPTS

Data

Structured Facts, Values of Parameters, Measures, No significant context

FUNDAMENTAL CONCEPTS

Information

Data plus contextual reference of meaning or value to the business or person

FUNDAMENTAL CONCEPTS

Knowledge

Compilation of already-processed relevant information and data, that guides humans in their use of info and data to make judgments and decisions

THE CLASSIFICATION OF KNOWLEDGE

Explicit Knowledge

Knowledge which is codified and articulated. It appears in the form of documents, procedures and in databases

Tacit Knowledge

Knowledge that is not codified but held in people's heads. Intuitive, experiential, judgmental and context sensitive, it may be difficult to articulate

KNOWLEDGE MANAGEMENT

Knowledge Management

- The art of generating value from intellectual and knowledge-based assets
- A formal structured initiative to improve the creation, distribution, and use of knowledge in an organization
- Leveraging the processes and content of intellectual capital to enhance the organization's ability to achieve its mission
- Linking people to people and people to information so that we can think together for better business results

WHAT KM IS

- It is about the group memory and experiences that are built through the contributions of the individuals and in turn build the capacity of the individual
- It is a means to an end; thus should be aligned with the institution's strategy

Excellence, Inc. Launch Technical Assistance

- It is multi-disciplinary: relates to all business functions
- It is about 70% people's efforts; the rest is not all technology

WHAT KM IS NOT

- It is not about quick-fixes but rather about building organizational capacity; however start small and think incremental
- It is not merely a huge repository of knowledge
- It is not simply about technology and IT; It is not about archiving systems, document retrieval systems, and email
- It is not about over-the-counter applications; solutions should be specific and tailored to organizations' needs
- It is a business investment not a financial burden
- It is not about establishing a department but an organization wide undertaking

CRITERION

OBJECTIVE OF CRITERION

Assess an organization with respect to:

- Comprehension of concept
- Resource-management strategy
- Effectiveness in achieving goals
- Building trust and cooperation

OPERATIONS –

AWARENESS AND COMMITMENT

Understand how KM supports achieving goals and how it relates to overall organizational strategy

Staff:

Understanding of importance for overall goals
Understanding of importance for the job

Senior management :

Commitment represented by allocation of resources
Relating KM responsibilities to job descriptions and appraisals
Visibly rewarding and recognizing team work and knowledge sharing

OPERATIONS - PLANNING

Clear documented strategy and appropriate infrastructure

Design:

Identified assets, requirements, priorities and action plans
Identified risks and designed reactive and proactive measures
Identifying how knowledge contributes to outputs

Implementation:

Maintain a database/knowledgebase of knowledge assets
Easy-to-use, continuously updated system
Dedicated team (primary function)

KM BUSINESS CASE

IMPACT – KNOWLEDGE DEPLOYMENT

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Flexible knowledge mapping is in place:

Mind mapping

Identify resources

Support with ICT

Continuous revision and updating of knowledge

Explicit:

Document management and archiving

Tacit:

Make tacit knowledge available in a useable format (e.g. gatherings)

KNOWLEDGE MAP

IMPACT – REVIEW AND ASSESSMENT

Organizational behavior:

Organization needs

Strategies and targets

Systems and capabilities

Technology

Individual behavior:

Ensure organization-wide participation and understanding

Relate knowledge sharing to performance reviews

Reward knowledge sharing

COMMUNICATIONS – INTERNAL

Identification of purpose and audience:

Organization-wide, timely awareness and feedback:

What other departments do

Successes

Issues and challenges

Solicitation of employee feedback

Communication plan:

Resourced

Flexible and consistent

Responsibilities, media, and timeline outlined

Centralize or coordinate communications

COMMUNICATIONS - EXTERNAL

Identification of purpose and audience:

Builds trust and a positive public image

Serves public outreach

Surveys stakeholders

Communication plan:

Flexible and consistent

Resourced

Responsibilities, media, and timeline outlined

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Test communication tools to ensure effectiveness
Centralized (have a PR or communications department)
Coordinate with partner organizations
Archiving of external communication documents

KM BOOSTING THE CULTURE

KM STRENGTHENING THE 3 PILLARS

Citizen-centered organization –

Ensuring accessibility of information in a readily useable format

Information should be timely, relevant, and accurate

KM STRENGTHENING THE 3 PILLARS

Results-focused organization –

Enhancing the decision making process

Providing right info, at the right time, to the right person, in the right format

KM STRENGTHENING THE 3 PILLARS

Transparent organization –

Building stakeholders' trust in the organization

To ensure employee cooperation, and build trust with external entities

BENEFITS TO THE ORGANIZATION

- Improved efficiency and productivity
- Improved response time
- Improved organizational/collective memory
- Basis for succession planning
- Support creating an environment for innovation and continuous improvement

QUESTIONS?

Annex 2: Criterion Gap Report

دائرة الأراضي والمساحة
تقرير تحليل الفجوات
معيار المعرفة

المعيار الفرعي رقم 1 : عمليات المعرفة					
العامل الأول : الوعي و الالتزام					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
1	تُعرّف "المعرفة" بوضوح كمزيج من المعلومات والخبرات		✓		بان الفهم موجود لدى اعضاء الفريق فمعنى ذلك ان هذا المبدأ موجود لكن بحالجة الى تدعيم على مستوى الدائرة
2	شرحت المؤسسة مفهوم إدارة المعرفة لموظفيها على كافة المستويات			✓	تم الشرح عن بنود معيار الجائزة ولكن ليس عن المفهوم و المبادئ كما لم يشمل الشرح المذكور جميع موظفي الدائرة
3	شرحت المؤسسة لموظفيها على كافة المستويات كيف يساعد السلوك الجيد في هذا المجال على تحقيق أهداف المؤسسة والأهداف الوطنية			✓	
4	شرحت المؤسسة لموظفيها على كافة المستويات كيف يساعد السلوك الجيد في هذا المجال على تحقيق أهداف الوظيفة			✓	

المعيار الفرعي رقم 1 : عمليات المعرفة					
العامل الأول : الوعي و الالتزام					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
5	هناك عمليات تقييم لفهم الموظفين لمفهوم إدارة المعرفة وعناصرها على كافة المستويات داخل المؤسسة			✓	
6	هناك عمليات تقييم لفهم القيمة التي تضيفها إدارة المعرفة إلى المؤسسة			✓	
7	تظهر الإدارة العليا التزاماً قوياً بسياسة إدارة المعرفة والأنشطة ذات العلاقة وأهمية ترويج وتعزيز إدارة المعرفة بين الموظفين		✓		يعي جميع المدراء مبادئ إدارة المعرفة و لكن الاولوية تعطى للعمل اليومي مما يضعف التزامهم بشكل عام
8	تخصص الإدارة العليا الموارد اللازمة	✓			وجود كتاب تكليف للفريق بالاضافة الى تخصيص الوقت والمكان للاجتماعات
9	يتضمن الوصف الوظيفي تحديد مسؤوليات كل وظيفة في مجال إدارة المعرفة و كيف يتم تقييم ومكافأة ذلك ويتم توثيق ذلك في اتفاقيات الأداء			✓	غير مذكور في الوصف الوظيفي و لا في اتفاقيات الاداء

المعيار الفرعي رقم 1 : عمليات المعرفة					
العامل الأول : الوعي و الالتزام					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
10	يتم مكافأة وتقدير وتعزيز أنشطة مشاركة المعرفة الفردية والفرقية		✓		تم مكافئة المشاركين بمجلة آفاق عقارية
11	تشجع المؤسسة الموظفين على التأكد من أن المعرفة متوافرة داخل المؤسسة قبل أن يحاولوا إيجادها أو الحصول عليها من مصدر خارجي ويقوم الموظفون بالتأكد من ذلك		✓		الاجراءات بشكل عام تشجع على ذلك ولكن حتى زمن قريب كانت اعادة العمل متكررة في الدائرة حتى جاءت الاجراءات لتدعم التوثيق
12	التدريب و التثقيف متاح في مجال إدارة المعرفة لكافة الموظفين على مختلف مستوياتهم			✓	
13	تم التعبير بوضوح في بيان مهمة المؤسسة و/أو خطتها الإستراتيجية عن إدارة المعرفة كأولوية من أولويات المؤسسة		✓		بشكل ما حيث ان عدد من الاهداف وكذلك الرؤية تذكر السهولة و الكفاءة في اداء الاجراءات و بالتالي فهي تلمح الى ادارة المعرفة

المعيار الفرعي رقم 1 : عمليات المعرفة
العامل الأول : الوعي و الالتزام
<p>: المقترحة الحلول</p> <p>لا بد من القيام بحملة توعية تشمل جميع اقسام الدائرة و مديرياتها للتعريف بمبادئ ادارة المعرفة و متطلباتها و كيف تساهم في تسهيل عمل كل موظف و بالتالي تحقيق اهداف الدائرة</p> <p>يجب توزيع استبيان بعد القيام بحملات التوعية للتأكد من ان الموظفتين استوعبا المبدأ</p> <p>التنسيق مع معيار الأفراد بحيث يضاف متطلب المشاركة بالمعرفة الى بطاقات الوصف الوظيفي بما يتناسب مع طبيعة العمل</p> <p>مراجعة نظام الحوافز و المكافآت لاضافة متطلبات المشاركة بالمعرفة</p> <p>ضرورة تأكيد المدير العام على باقي المدراء على اهمية الالتزام</p>

المعرفة رقم 1 : عمليات الفرعي المعياري					
العامل الثاني : التخطيط					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
1	لدى المؤسسة استراتيجية معرفة مكتوبة ومحددة بشكل واضح	✓			لدى المؤسسة خطط عمل لمشروع ادارة المعرفة يجب قلمبتها في اطار استراتيجي ومن ثم مراجعتها لضمان شمولها لكل ما يلزم عمله
2	عينت المؤسسة شخصا ليضطلع بمهمة متابعة ومراقبة تنفيذ إستراتيجية إدارة المعرفة، بما في ذلك تطوير موارد إدارة المعرفة وأدواتها	✓			عينت المؤسسة فريقا لذلك كما تفكر بإنشاء قسم لمأسسة العمل و استمراريته
3	حددت المؤسسة بوضوح متطلباتها المعرفية الأساسية وكيف تساعد هذه المعرفة على تحقيق النتائج وربطتها بها في الخطة الاستراتيجية		✓		تم العمل على تعيين المتطلبات و الموجودات و ينعكس ذلك بشكل واضح في خطط التعيين أكثر من خطط التدريب و لكن لا يظهر بشكل واضح في الخطة الاستراتيجية
4	حددت المؤسسة بوضوح الثغرات بين متطلبات المعرفة ونخرها المعرفي ذو الفائدة وقامت بتوثيقها، ووضعت خططا وألويات لسد هذه الثغرات في استراتيجية إدارة المعرفة			✓	
5	في سعيها لسد هذه الثغرات، حاولت المؤسسة أولاً إيجاد و/أو خلق المعرفة من داخل المؤسسة	✓			تحاول اسلطة سد الثغرات داخليا لعلمها بعدم وجود المعرفة المطلوبة في اي مؤسسة اخرى في الاردن

المعرفة رقم 1 : عمليات الفرعي المعياري					
العامل الثاني : التخطيط					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
6	ترجمت المؤسسة أهداف إدارة المعرفة إلى أهداف ملموسة ومعقولة لأدائها الكمي و النوعي		✓		
7	تحتفظ المؤسسة بقاعدة بيانات لموجوداتها المعرفية الأساسية والتي تشتمل على سرد لنوع المعرفة وموقعها والشخص الذي ينبغي الإتصال به للحصول عليها		✓		لكل مديرية فهرسها الخاص و نظام ارشفتها الخاص واستعماله واضح لباقي المديرية هناك فهرس محوسب للخرائط كما يوجد في الدائرة مكتبة و اخرى الكترونية يجري العمل لاعداد فهرس المعرفة الضمنية
8	حدّدت المؤسسة التهديدات أو المخاطر التي تواجه موجوداتها المعرفية وكيفية التعامل مع ذلك	✓			تم تحديد ذلك من خلال ورشة عمل مشروع ادارة المعرفة
<p>الحلول المقترحة :</p> <p>دراسة استراتيجية الدائرة لبيان الربط مع استراتيجية ادارة المعرفة مراجعة الوثائق لتجميع استراتيجية ادارة المعرفة تعميم استراتيجية المعرفة التأكيد على تحديد الثغرات المعرفية و ادراج التعامل معها ضمن الاستراتيجية</p>					

المعيار الفرعي رقم 2 : أثر المعرفة					
العامل الأول : نشر المعرفة					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
1	تحتفظ المؤسسة بنظام لإدارة التوثيق والأرشفة، سواء أكان هذا النظام يدويا أو الكترونيا	✓			
2	يشمل هذا النظام الوثائق الداخلية وتلك المخصصة للاستعمال الخارجي	✓			
3	لدى المؤسسة نظام لحفظ الوثائق بعد انقضاء فترة زمنية محددة	✓			ISO9000 حسب القوانين و الانظمة و اجراءات
4	تتيح المؤسسة سبل الإطلاع على الموجودات المعرفية الضمنية لموظفيها، من داخل المؤسسة من خلال توثيقها أو عقد دورات تدريبية داخلية	✓			بشكل ام هذا موجود الا انه من الضروري تفعيل المحاضرات بعد حضور ورشات التدريب بشكل اكبر
5	هناك قيود على سبل الحصول على المعلومات غير السرية وغير الشخصية	✓			هناك امناء للارشيف و غيره من السجلات وكذلك للديوان بالاضافة الى اجراء الجودة و انظمة تكنولوجيا المعلومات الي تضمن ذلك ينصح بتوثيق جميع هذه القيود في وثيقة واحدة

المعيار الفرعي رقم 2 : أثر المعرفة					
العامل الأول : نشر المعرفة					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
6	تتبع المؤسسة وسائل وأساليب لتوفير المعلومات المتاحة في المؤسسة إلى كافة مثل وجود مكتبه أو نظام إلكتروني الموظفين، لتبادل الملفات		✓		يتواجد نظام المكتبة بالإضافة إلى أساليب تبادل المعلومات حسب البرامج المستخدمة في العمل اليومي لكن من الضروري التأكد بان هذه الانظمة تغطي جميع انواع المعلومات
7	يشتمل هذا النظام على إجراءات لحماية أمن المعلومات وسريتها و/أو سلامتها	✓			
8	تُحَرِّز المؤسسة المعلومات بطريقه تُيسِّر للمستخدمين سبل الحصول عليها في الوقت المطلوب وتحتفظ "بخارطة معرفية" منظمة وحديثة لإرشاد الموظفين إلى مكان المعلومات التي يبحثون عنها		✓		ليس هناك خارطة واضحة الا ان معظم مكوناتها موجودة ضرورة وضع هيكل ارشادي واحد ضرورة ادخال موظف من قسم التدريب على لجنة شراء نظام الموارد البشرية لضمان شموله لخريطة المعرفة الضمنية
9	الخارطة مرنة وتبين للموظفين الطرق المتعددة للحصول على المعلومات وسبل الوصول إليها			✓	
10	حددت المؤسسة بوضوح أفضل المصادر للحصول على معلومات محددة	✓			تم تحديد الجهات الخارجية التي تستطيع تزويد الدائرة بالمعلومات المختلفة و هي موثقة في الاجراءات

المعيار الفرعي رقم 2 : أثر المعرفة					
العامل الأول : نشر المعرفة					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
11	تدعم الوزارة محاكاة الأفكار والآراء، وتبادل المعرفة (بما في ذلك المعرفة الضمنية) والتعلم وتعدّد لقاءات عمل منتظمة للموظفين الذين يضطلعون بمهام متشابهة لتطوير وتبادل المعرفة فيما بينهم		✓		تطلب الدائرة من الموظفين الذين يحضرون لقاءات تدريبية ان يقوموا بتقديم محاضرات عنها الا ان نسبة الالتزام منخفضة ولم تتم مكافئة من قاموا بذلك تم مكافئة المشاركين بمجلة آفاق عقارية معظم اللقاءات التدريبية داخلية بسبب طبيعة عمل الدائرة
12	لدى المؤسسة استراتيجية للمعلومات والاتصالات لتحديد احتياجاتها وتطوير مواردها في مجال المعلومات والاتصالات لتحقيق أهداف المنظمة وأغراضه	✓			الخطة السنوية تعكس ذلك
13	تحتفظ المؤسسة بنظام فاعل لتقنية المعلومات لدعم عملية تبادل المعرفة، والاتصال والتعلم المؤسسي وتم تدريب الموظفين بشكل جيد يتيح لهم الاستفادة القصوى من هذا النظام	✓			هناك نظام البريد الالكتروني وكذلك المكتبة الالكترونية تم التدريب على النظام الاول اما المكتبة الالكترونية فسيتم التدريب عليها حال انهاء العمل بها بالاضافة الى تدريب الموظفين المعنيين على البرامج المتعلقة بادائهم اليومي
المقترحة : الحلول ضرورة توثيق القيود على سبل الاطلاع على مستودعات المعلومات ضرورة تفعيل برنامج المحاضرات بعد حضور برنامج التدريب ضرورة وضع هيكل عام للمعرفة يقوم مقام الخرائط ضرورة استكمال مشروع خريطة المعرفة الضمنية الذي بدنه قسم التدريب ضرورة تخصيص وقت للموظفين ذوي الاهتمامات المتشابهة لتبادل الخبرات					

المعيار الفرعي رقم 2 : أثر المعرفة					
العامل الثاني : المراجعة و التقييم					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
1	تراقب المؤسسة سلوك الموظفين حيال إدارة المعرفة، بما في ذلك كيفية تبادل المعرفة الضمنية فيما بينهم (يمكن القيام بذلك من خلال تقييم أداء الموظفين)			✓	
2	تراجع المؤسسة بانتظام مدى تقدمها على طريق تحقيق أهدافها الأدائية في مجال إدارة المعرفة			✓	
3	تراجع المؤسسة بانتظام استراتيجيتها في مجال إدارة المعرفة وتأخذ في الحسبان نتائج هذه المراجعات			✓	
4	تراجع المؤسسة بانتظام فاعلية استراتيجية تقنية المعلومات والاتصالات المطبقة لديها بحيث تأخذ في الحسبان نتائج هذه المراجعات	✓			
5	تراجع المؤسسة محتواها المعرفي وقاعدة بياناتها		✓		هذا جزء من نظام الجودة بالنسب للإجراءات كما تضمن الدائرة استعمال أحدث الاساليب و المعدات في عملها الا انه من الضروري التأكد من عدم اغفال اي محتوى معرفي آخر

المعيار الفرعي رقم 2 : أثر المعرفة

العامل الثاني : المراجعة و التقييم

: المقترحة الحلول

ضرورة حضور جلسة تدريبية على كيفية المراجعة و التقييم مع فريق معيار القيادة بحيث يطبق نفس الاسلوب على استراتيجية المعرفة
ضرورة تحديد مسؤوليات و تكرار تحديث المحتوى المعرفي
ضرورة تطبيق معايير تقييم و مكافأة المشاركين بالمعرفة لتشجيعهم

المعيار الفرعي رقم 3 : الاتصالات					
العامل الأول : الاتصالات الداخلية					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
1	تحتفظ المؤسسة باستراتيجية اتصالات داخلية (تحدد الأهداف والرسائل والفئات المستهدفة والأدوات وآليات التقييم الملائمة لأنشطتها في مجال الاتصالات الداخلية) وعهدت المؤسسة بالمسؤولية عن الاتصالات الداخلية لدائرة تنظيمية معينة كجهة مركزية من حيث التخطيط والتنظيم وربما التنفيذ كما توجد توجيهات واضحة مكرسة للاتصالات الداخلية حول التعاون بين الموظفين من مختلف الدوائر			✓	
2	هناك خطة عمل واضحة لتنفيذ استراتيجية الاتصالات وتحدد مسؤوليات ومهام واضحة وبرامج زمنية لإيجاد ونشر المواد الاتصالية وهي مرنة بما فيه الكفاية بحيث تسمح بإجراء إضافات وتعديلات مقبولة		✓		هناك خطط عمل متفرقة يجب ضمها تحت هذا البند
3	يمتلك موظفو هذه الدائرة المهارات الضرورية لتخطيط وتنفيذ وتقييم استراتيجية الاتصالات الداخلية			✓	

المعيار الفرعي رقم 3 : الاتصالات					
العامل الأول : الاتصالات الداخلية					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
4	تدعم الإدارة العليا أنشطة الاتصالات الداخلية	✓			
5	تخصص المؤسسة عدداً كافياً من الموظفين المؤهلين وموارد مالية كافية لتنفيذ خطة العمل كما تستعين المؤسسة بكوادر من الخارج للقيام بتقديم الخدمات الاتصالية والتي لا تستطيع المؤسسة القيام بها من الداخل		✓		
6	يعلم موظفو المؤسسة على مختلف مستوياتهم باستراتيجية الاتصالات الداخلية ويفهمونها			✓	
7	تتمتع استراتيجية الاتصالات الداخلية بالمرونة الكافية للاستفادة من الفرص غير المتوقعة			✓	
8	حيثما يكون ذلك ملائماً، يتم اختبار أدوات الاتصال الداخلي قبل أداؤها الفعلي للتأكد من استخدام الصيغ الأكثر فاعلية			✓	

المعيار الفرعي رقم 3 : الاتصالات					
العامل الأول : الاتصالات الداخلية					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
9	تجري المؤسسة مسحاً رسمياً لموظفيها وتستخدم أسلوب التغذية الراجعة لتقييم قدرة أنشطة الاتصالات الداخلية على زيادة وعي الموظفين حول القضايا المؤسسية، والمساعدة في تسهيل التعاون بين موظفي الدوائر المختلفة وتعمل على توظيف تلك النتائج		✓		هناك ندوق للشكاوى و الاقتراحات و لكن يجب وضع اجراء لذلك و تفعيله
<p>المقترحة : الحلول</p> <p>تحديد المجموعات التي ينتمي اليها الموظفين بحيث يمكن بناء استراتيجية الاتصالات عليها</p> <p>وضع خطة و استراتيجية اتصالات شاملة لكل البنود السابق ذكرها بحيث تغطي تحديد الجهات المستهدفة و الهدف من التواصل معها و كذلك تحديد المسؤولية و تكرار التواصل</p> <p>التأكد من ان تكون عملية الاتصالات مركزية او على الاقل مراقبة و منسقة</p> <p>تضمين خطط العمل الفرعية في الخطة</p>					

المعيار الفرعي رقم 3 : الاتصالات					
العامل الثاني : الاتصالات الخارجية					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
1	تحتفظ المؤسسة باستراتيجية اتصالات خارجية (تحدد الأهداف والرسائل والفئات المستهدفة) (المتعاملين) والأدوات وآليات التقييم الملائمة لأنشطتها في مجال الاتصالات الخارجية) وعهدت المؤسسة بالمسؤولية عن الاتصالات الخارجية لدائرة تنظيمية معينة كجهة مركزية من حيث التخطيط والتنظيم وربما التنفيذ كما توجد توجيهات واضحة مكرسة للاتصالات الخارجية حول التعاون بين الموظفين من مختلف الدوائر			✓	
2	هناك خطة عمل واضحة لتنفيذ استراتيجية الاتصالات وتحدد مهام واضحة وبرامج زمنية لإيجاد ونشر المواد الاتصالية و هي مرنة بما فيه الكفاية بحيث تسمح بإجراء إضافات وتعديلات مقبولة		✓		
3	يمتلك موظفو هذه الدائرة المهارات الضرورية لتخطيط وتنفيذ وتقييم الاستراتيجية		✓		

المعيار الفرعي رقم 3 : الاتصالات					
العامل الثاني : الاتصالات الخارجية					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
4	تدعم الإدارة العليا أنشطة الاتصالات الخارجية	✓			
5	تخصص المؤسسة عدداً كافياً من الموظفين المؤهلين وموارد مالية كافية لتنفيذ خطة العمل كما تستعين المؤسسة بكوادر من الخارج للقيام بتقديم الخدمات الاتصالية والتي لا تستطيع المؤسسة القيام بها من الداخل		✓		
6	يعلم موظفو المؤسسة على مختلف مستوياتهم باستراتيجية الاتصالات الخارجية ويفهمونها			✓	
7	تتمتع استراتيجية الاتصالات الخارجية بالمرونة الكافية للاستفادة من الفرص غير المتوقعة			✓	
8	حيثما يكون ذلك ملائماً، يتم اختبار أدوات الاتصال الخارجي قبل أداؤها الفعلي للتأكد من استخدام الصيغ الأكثر فاعلية			✓	

المعيار الفرعي رقم 3 : الاتصالات					
العامل الثاني : الاتصالات الخارجية					
#	المتطلب	نعم	بشكل جزئي	لا	الملاحظات والفجوات (إن وجدت)
9	تجري المؤسسة مسحاً رسمياً لمتعاملاتها وتستخدم أسلوب التغذية الراجعة لتقييم قدرة أنشطة الاتصالات الخارجية على زيادة وعي المتعاملين حول القضايا المؤسسية، وتعمل على توظيف تلك النتائج		✓		هناك صندوق للاقتراحات و الشكاوي بالإضافة التوزيع بعض الاستبيانات ولكن من الضروري وضع اجراء شامل لذلك
<p>المقترحة الحلول :</p> <p>الحصول من فريق القيادة على قائمة بالشركاء و المتعاملين و ذوي العلاقة وضع خطة و استراتيجية اتصالات شاملة لكل البنود السابق ذكرها بحيث تغطي تحديد الجهات المستهدفة و الهدف من التواصل معها و كذلك تحديد المسؤولية و تكرار التواصل التأكد من ان تكون عملية الاتصالات مركزية و ذلك عن طريق تسليمها لقسم العلاقات العامة او وحدة ادارة المعرفة بحيث يتولى ذلك و بتنسيق دوره مع الناطق الاعلامي</p>					

Annex 3: KM Requirements Checklist

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Knowledge Operations

Awareness and Commitment

KM is defined as info and experience

Methods to spread understanding of KM key elements and culture

Methods to evaluate understanding of KM key elements and culture

Understand how KM contributes to goals and efficiency in achieving them

Understand how KM contributes to individual tasks and jobs

Understand how KM adds value to the organization

Senior Management is committed (and demonstrates that) to KM practices

Senior Management allocates resources (and demonstrates that) to KM practicing

KM responsibilities are outlined in job descriptions

Active promotion of good KM behavior exists (encouragement, rewarding, and visible recognition)

Employees understand the value behind checking if knowledge exists within the organization before recreating it

Employees check if knowledge is available before recreating

Training in KM practices and systems is available for all staff at all levels

Planning

There exists a sponsor for the implementation of KM initiatives

The main responsibility towards KM is within a team (leads initiatives and pushes for implementation)

A clear KM strategy exists in the minds of people

The clear KM strategy is documented

KM strategy has been communicated

KM strategy defines how it relates to outputs and results

Knowledge assets have been identified

Knowledge assets have been evaluated and filtered

Knowledge assets have been documented

Knowledge requirements have been identified based on goals of the organization and based on functions performed

Requirements have been prioritized

Knowledge requirements have been documented

KM goals were translated into tangible quantitative and qualitative performance targets

Setting those goals was through a participatory approach (staff and management)

Action plans are in place

Responsibilities are assigned

Responsibilities (if possible) are outlined in job descriptions and assignments

There exists a database of knowledge assets (location/person, format, date acquired, initiator,...)

Database is easy to navigate

Employees have been trained on how to use it

Database is continuously reviewed

Content is continuously reviewed

Risks to knowledge content have been identified

Risks to knowledge systems have been identified

Risks have been evaluated in terms of probability and impact

Risks have been prioritized

Contingency planning for content is in place

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Contingency planning for systems is in place

Knowledge Impact

Knowledge Deployment

Management ensures time and space for learning and idea sharing

Concept of deployment is clear (capturing, creating, sharing, and using)

A document management system exists (manual/electronic)

Document management system is aligned with organizational needs

An archiving system exists (manual/electronic)

Privileges and access have been properly assigned

Efforts and systems exist to share tacit knowledge (socialization and capturing)

Efforts and systems exist to share explicit knowledge (libraries, shared files, ...)

Teamwork is promoted

Knowledge maps exist

Knowledge maps are well structured

Knowledge maps get updated

Knowledge maps are flexible (multiple ways to access something)

External sources of info and knowledge are identified

Seminars for knowledge sharing and learning exist

Succession planning is in place

IT strategy exists

IT strategy is aligned with KM strategy

Employees are adequately trained to take advantage of IT systems

Employees are trained every time there is an addition to IT systems

Employees benefit from and use the IT infrastructure

Review and Assessment

The organization regularly reviews knowledge assets to evaluate validity

The organization regularly reassesses gaps and needs

Organization reviews progress in meeting goals

Organization revises KM strategy based on assessment

The organization monitors employee behavior regarding knowledge sharing and makes that part of performance reviews

Knowledge sharing is rewarded and recognized

Teamwork is rewarded and recognized

Succession planning is reviewed

Organization revises individual KM responsibilities based on assessment

Job descriptions and assignments get updated based on KM strategy review and individual reviews

IT strategy is reviewed

IT strategy gets updated based on reviews

Communications

Internal Communications

Senior management supports internal communications efforts

There is an internal communication strategy

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Strategy is dynamic and flexible and is capable of responding to crises

Objectives are identified

Messages, Target audience, Tools, and Frequency were identified

Action plans exist

Responsibilities are assigned and tasks defined

Internal communication strategy covers supplier evaluation

External suppliers are hired based on a cost-benefit analysis when needed

Internal communication is centralized or coordinated with clear guidelines for cooperation

Some employees are devoted (partially or totally) to internal communication

Responsible employees are well trained

Tools are tested prior to use, or evaluated after use

Assessment mechanisms are in place

Strategy is reviewed and updated based on results of review

Organization surveys success of communications activities (organization-wide)

Feedback is solicited on elements including communication tools

There is a mechanism to secure continuous feedback (focus groups, ...)

Feedback mechanisms are tested for effectiveness

Feedback results are used

External Communications

Senior management supports external communications efforts

There is an external communication strategy

Strategy is dynamic and flexible and is capable of responding to crises

Objectives were identified

Messages, Target audience, Tools, and Frequency were identified

Action plans exist

Responsibilities are assigned and tasks defined

External communication strategy covers supplier evaluation (communicate results for transparency)

External suppliers are hired based on a cost-benefit analysis when needed

External communication is centralized

Devoted employees (totally or partially, but time allocated)

Responsible employees are well trained

Financial resources are in place

Tools are tested prior to use

Assessment mechanisms are in place

Strategy is reviewed and updated based on results of review

Organization surveys success of communications activities (organization-wide)

Continuous surveying of stakeholders to test effectiveness

Continuous surveying of audience to ensure a positive image is created

Continuous evaluation and modification of communication tools

There is a mechanism to secure continuous feedback (from employees as well as external entities)

Feedback mechanisms are tested for effectiveness

Feedback results are used

External communications documents are managed through an archiving and document retrieval system

External communication is coordinated with partner organizations

Outcomes

Organization benchmarks itself against similar organizations in different countries
Organization encourages management to study and adopt best practices
Organizations has identified its customers and stakeholders
Plan for e-government exists
E-government responsibilities and sponsor were assigned
E-government responsible people were adequately trained
E-government implementation has started
Website exists
Website is continuously assessed and reviewed
Website friendliness is continuously assessed and reviewed
Customer service call center exists
Customer service front desk exists
Organization receives positive feedback from stakeholders
Lessons learned are disseminated
There has been one major innovation/improvement in the past year that was a direct result of KM implementation
The organization publishes an annual report
The organization assess the spread and perceived benefit and use of the annual report

Documents

KM case
Organization strategy
KM strategy
IT strategy
Communications strategy
List of IT systems in use
List of any knowledge maps/ or examples
Sample surveys
KM buy-in presentations (explaining concept and benefits to employees)
KM awareness surveys
Sample job description
Sample performance evaluation form
Reward and recognition policy
KM team formation and name of senior management sponsor
Training records
Organizational structure with PR dept defined
Responsibilities of PR dept
Description of feedback mechanisms (internal and external)
List of customers and stakeholders
MOU with partners concerning coordination

Annex 4: Toolkit Master List

KNOWLEDGE MANAGEMENT Criterion						
Last Date Update:						
Requirement/ CRITERION	Training Materials	Templates	Case Study/ Example	Best Practice/ Methodology	Reference	Format and Location
Information Retrieval / IMPACT - DEPLOYMENT					Document Retrieval (whitepaper)	Hard Copy in File
Information Retrieval / IMPACT - DEPLOYMENT					Search tools as a driver for KM	Soft under Articles
Tacit to Explicit / IMPACT - DEPLOYMENT				Tacit to explicit		Soft under PB
Planning / OPERATIONS – PLANNING					101 ways to fail	Soft under articles
Awareness / OPERATIONS - AWARENESS			KM in canada’s public sector			Soft under case studies
Drivers / OPERATIONS- PLANNING			Canadian Compensation Bureau			Soft under Cases
Drivers / OPERATIONS- PLANNING			KM for Ministers			Soft under Cases

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/ Strategies OPERATIONS - PLANNING			KM Strategies Outline			Soft under Templates
practices / Tacit IMPACT - DEPLOYMENT			Tacit knowledge practices			Soft under BP
/ Drivers -OPERATIONS PLANNING			Strategic Benefits of KM – call centers			Soft under Articles
/ Awareness OPERATIONS - AWARENESS				Success Factors		Soft under BP
/ Awareness OPERATIONS - AWARENESS				ABCs of KM		Soft under BP
/ Awareness OPERATIONS - AWARENESS				Definitions		Soft under BP
/ Awareness OPERATIONS - AWARENESS				EFQM implications		Soft under White Papers
Planning / OPERATIONS - PLANNING	KM system checklist					Soft under Gap Analysis

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Mapping / OPERATIONS- PLANNING					Organizing Business Knowledge	Soft under Books
Planning / OPERATIONS - PLANNING					Australian Standards	Soft under standards (NOT FOR SHARING)
SNA / IMPACT - DEPLOYMENT				Social Network Analysis		Soft under BP
Info security/ DEPLOYMENT - IMPACT					BS7799 Standard	Hard in Folder
Communications/ COMMUNICATION – INTERNAL & EXTERNAL				Steps to define communications plan		Soft under Communications
Communications/ COMMUNICATION – INTERNAL					Internal Communications	Soft under Communications
Communications/ COMMUNICATION –EXTERNAL					External Communications	Soft under Communications

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Awareness / OPEARTIONS AWARENESS	KM Presentation 1hr old format					Soft under criteria presentations
Awareness / OPEARTIONS AWARENESS	KM Biz Value					Soft under criteria presentations
Awareness / OPEARTIONS AWARENESS	KM Presentation 2hr					Soft under criteria presentations
Awareness / OPEARTIONS AWARENESS				Knowledge champion--CoE Team 110404		Soft under BP
K Mapping / IMPACT DEPLOYMENT			Sample Knowledge Map			Soft under mapping
K Mapping / IMPACT DEPLOYMENT				Essentials of Requirement Identification		
Communications/ COMMUNICATION – INTERNAL & EXTERNAL				Public-Private Partnerships Communications Toolkit		Soft under communications

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Communications/ COMMUNICATION –EXTERNAL	Media training slides					Soft under communications
Communications/ COMMUNICATION –INTERNAL & External					Leading a meeting workbook	Soft under communications
Communications/ COMMUNICATION –INTERNAL & External				Drawing up a communication plan		Soft under communications
Strategy / OPERATIONS – PLANNING				Developing a KM strategy		Soft under BP
				Employee interviews for mapping AND Selecting employees		Soft under BP
				34 ways to promote intranet		Soft under BP
				CoPs		Soft under BP
					Want to manage tacit knowledge?	Hard under White papers
Planning	Relationship between					Soft under presentations

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	KM, IM, and IT					
Planning	The knowledge-centric organization journey					Soft under presentations
Awareness	What is knowledge management					Soft under presentations
Planning				KM Strategy		Soft under strategy
Planning			KMC_KMSstrategy		KMC_KMSstrategy	Soft under strategy

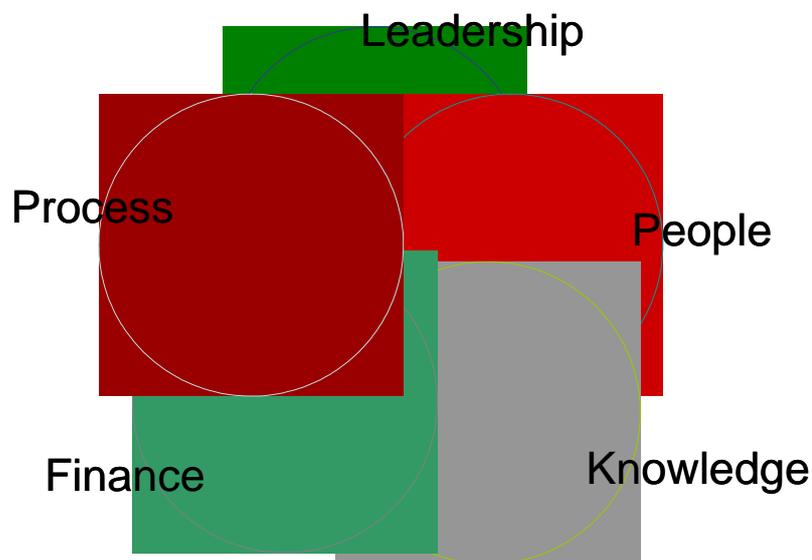
Annex 5: Material for Brochure

PAGE1:

About us

Excellence, Inc. assists public and private institutions upgrade their operations to help them effectively compete in the global economy. The firm serves as a champion of institutional excellence; guiding organizations through the design and implementation of change management programs that focus on best utilizing existing resources and that are led from within.

Excellence, Inc. spreads the concept of operational excellence and supports organizations in five key areas: leadership, people, processes, knowledge, and finances. The firm embraces its own excellence technologies to accomplish these ambitious goals just as it expects its client institutions to embrace them.



CAPTION: Key Areas for Achieving Excellence

PAGE 2:

Background

Excellence, Inc. is based on the Centers of Excellence (COE) program and was created, as a not-for-profit, to further COE's efforts in supporting private sector-driven economic growth. The concept was derived from four years of experience working closely with government and private institutions in Jordan, and was further developed into a comprehensive system for working with government agencies to encourage them to aspire to excellence in leadership, management and operations. Launched in 2002, the COE initiative developed a clientele of eight government and quasi-government institutions, assessed them, and gained their active participation in the implementation of the excellence methodology.

The COE program was created by the United States Agency for International Development (USAID) through its highly successful economic opportunities project, AMIR Program. Excellence, Inc. was created to sustain the initiative beyond the AMIR Program and to broaden its target market to include private firms, business associations, and other institutions inside and beyond the borders of Jordan.

In addition, Excellence, Inc. is the preferred provider of technical assistance for the King Abdullah Award for Government Performance and Transparency (KAAGPT). The Award supports the public sector reform program focused on providing better service for the public.

PAGE 3:

Our Vision

To be the model provider of international cutting edge practices to institutions seeking excellence.

Our Mission

We use proven models and international best practices to guide institutions through organizational transformation towards achieving a culture of excellence.

Our Values:

At Excellence, Inc. we are committed to the culture of excellence that we promote. We value:

Efficiency
Transparency
Forward thinking and innovation
Customer orientation and quality services
Continual improvement
and
Social responsibility

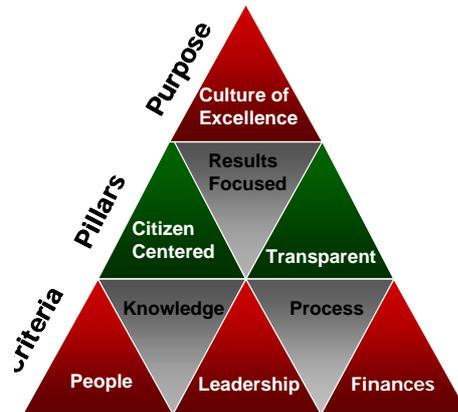
We believe in our employees and strive to maintain a supportive work environment where integrity, honesty, and openness prevail.

PAGE 4 (we'll have 3 alternatives for this, depending on the client):

Version: Public

Culture of Excellence

Excellence, Inc. will help its clients adopt and adapt international best practices in five key areas that will support the creation of citizen-centered, results-focused, and transparent organizations. The fundamentals of the model we have developed are espoused by the Organization for Economic Cooperation and Development (OECD).

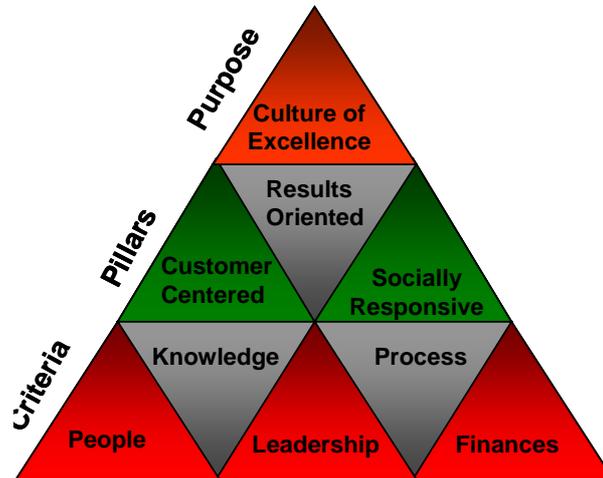


Caption: The Foundations of a Culture of Excellence

Version: Private

Culture of Excellence

Excellence, Inc. will help its clients adopt and adapt international best practices in five key areas that will support the creation of a customer-centered, socially- responsive and results-oriented organization. The fundamentals of the model we have developed are espoused by the European Foundation for Quality Management (EFQM).

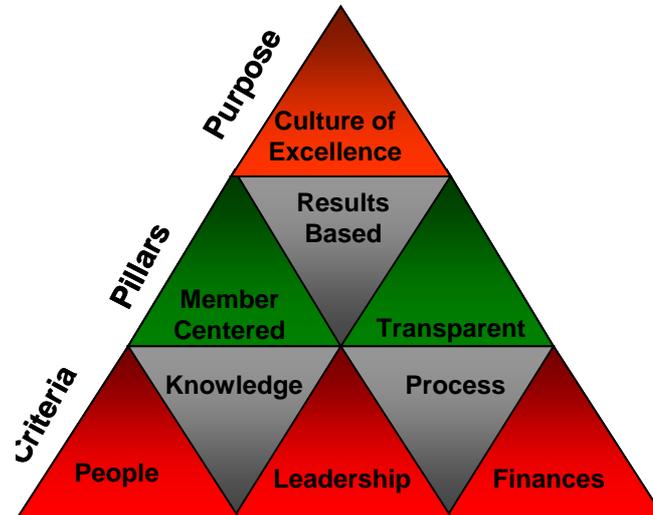


Caption: The Foundations of a Culture of Excellence

Version: Associations

Culture of Excellence

Excellence, Inc. will help its clients adopt and adapt international best practices in five key areas that will support the creation of a member-centered, results-based, and transparent organization. The fundamentals of the model we have developed are espoused by the Organization for Economic Cooperation and Development (OECD).



Caption: The Foundations of a Culture of Excellence

Page 5: (we'll have 3 alternatives for this, depending on the client):

Services

Public Institutions
<ul style="list-style-type: none"> ○ Institutional Transformation <ul style="list-style-type: none"> ▪ Overview <p>Excellence, Inc.'s (EI) Centers of Excellence (COE) approach aims to assist dynamic government and quasi-government entities in embracing the three pillars of international best practice in governance. These pillars dictate that modern government should be: (1) citizen-centered, (2) results-focused, and (3) transparent. The roots of these pillars, and of international government best practice, stem from the global trend in which governments are adopting appropriate private sector practices for powerfully effective governance. The COE Program guides institutions on how to embrace these pillars, adopt a culture of excellence, and achieve certified COE status. EI's COE Program facilitates transformation that is led from <i>within</i> each partner institution. The approach contains common elements that apply to all organizations, regardless of their individual missions and responsibilities or existing structures. The focus is on best utilizing an organization's existing resources. However, by working with multiple institutions and facilitating collaboration and cross-fertilization of ideas and initiatives, the COE approach is an extremely valuable tool for leveraging myriad government and/or donor initiatives.</p> <p>A Center of Excellence is an institution recognized for its superior and ongoing operating effectiveness in the business of government. A Center of Excellence understands its role in the greater government structure, and has institutionalized a <i>culture of excellence</i> that embraces the three pillars of international government best practice: <i>citizen-centered</i>, <i>results-focused</i>, and <i>transparent</i>. Five criteria — the five stars of COE certification — represent the functional areas in which an institution is assessed as to its level of accomplishment in the three pillars and, ultimately, in creating an institutional culture of excellence. A five-star Center of Excellence has achieved or surpassed the international standards for best practice in its governing functions.</p>
<ul style="list-style-type: none"> ▪ Change Guidance <p>Excellence, Inc. assists organizations through a process of designing, implementing, and monitoring improvements in the management disciplines of Leadership, People, Processes, Knowledge, and Finances. The Excellence Team at the organization will identify priorities for change and Excellence, Inc. experts will help manage institutional transformation to achieve the desired results.</p>
<ul style="list-style-type: none"> ▪ Benchmarking Assessments <p>Excellence, Inc. carries out a benchmarking assessment in each of the five management criteria. These assessments are conducted by expert assessors together with a counterpart Excellence Team member from client organization. The purpose of the assessment is to gauge the organizations performance against best practices and identify strengths and areas for improvement. It also transfers a heightened understanding of the three pillars of international best practice in government. Excellence, Inc will present a confidential gap analysis report to the Excellence Team and the leadership of the organization.</p>
<ul style="list-style-type: none"> ▪ Common Interest Forums <p>Excellence, Inc.'s common interest forums bring together Excellence Teams from multiple government institutions on a regular basis to discuss performance improvement ideas.</p> <p>Common interest forums serve multiple purposes, which include: (1) providing an arena for the cross fertilization of ideas across government</p>

Excellence, Inc. Launch Technical Assistance

<p>organizations</p> <ul style="list-style-type: none">(2) identifying shared opportunities and constraints(3) prioritizing common institutional strengthening needs(4) providing support for reform implementation(5) serving as a learning environment for government best practices(6) providing a feedback mechanism for decision makers on key areas of macro-level reform (i.e. civil service regulations).
<ul style="list-style-type: none">▪ Shared Technical Assistance <p>One purpose served by Common Interest Forums in each of the criteria is the identification of shared opportunities and challenges amongst participating institutions. Excellence, Inc. will contract and fund technical assistance that is identified as a priority need of multiple client institutions in one or more of the criteria. This common approach serves as a valuable means to leverage technical assistance and funding for institutional development.</p>
<ul style="list-style-type: none">▪ The Knowledge Base <p>Excellence, Inc. maintains an online knowledge base of strategies, best practices, case studies, training materials, templates and other tools to support Excellence Team members in driving internal reforms.</p> <p>The knowledge base will be accessible by clients to facilitate the transformation process.</p>
<ul style="list-style-type: none">▪ Excellence Certification <p>Once the client organization believes it has met the necessary criteria, it can apply for Center of Excellence Certification in one or more criteria. An assessment will be conducted by Excellence, Inc. assessors to determine the organization's status. The validity of the Certificate is for ONE YEAR from date of issuance</p>

Excellence, Inc. Launch Technical Assistance

Services
Associations and Not-for-profits Corner
○ Institutional Transformation
▪ Overview
<p>The Center of Excellence approach catalyzes an internally driven pursuit of a culture of excellence amongst partner institutions. The institutional transformation services support management reforms in five fundamental areas: leadership, people, processes, knowledge, and finances. In driving these reforms and pursuing a culture of overall organizational excellence, organizations are coached on how to embrace three pillars of international best practice, that an association or not-for-profit should be (i) member-centered, (ii) results-focused, and (iii) transparent.</p> <p>Excellence Inc.'s COE Program facilitates transformation that is led from <i>within</i> each partner institution. The approach contains common elements that apply to all organizations, regardless of their individual missions and responsibilities or existing structures. The focus is on best utilizing an organization's existing resources. However, by working with multiple institutions and facilitating collaboration and cross-fertilization of ideas and initiatives, the COE approach is an extremely valuable tool for leveraging resources and efforts and achieving increased efficiencies. Together, these services are far greater than the sum of their parts in supporting non-governmental organizations.</p>
▪ Change Guidance
<p>Excellence, Inc. assists organizations through a process of designing, implementing, and monitoring improvements in the management disciplines of Leadership, People, Processes, Knowledge, and Finances. The Excellence Team at the organization will identify priorities for change and Excellence, Inc. experts will help manage institutional transformation to achieve the desired results.</p>
▪ Benchmarking Assessments
<p>Excellence, Inc. carries out a benchmarking assessment in each of the five management criteria. These assessments are conducted by expert assessors together with a counterpart Excellence Team member from the client organization. The purpose of the assessment is to gauge the institution against international best practices, and identifying strengths and areas for improvement. It also helps transfer a heightened understanding of the three pillars of international best practice. Excellence, Inc will present a confidential gap analysis report to the Excellence Team and the leadership of the organization.</p>
▪ Common Interest Forums
<p>Excellence, Inc.'s common interest forums bring together Excellence Teams from multiple client institutions on a regular basis to discuss performance improvement ideas.</p>

Excellence, Inc. Launch Technical Assistance

Common interest forums serve multiple purposes, which include:

- (1) providing an arena for the cross fertilization of ideas across organizations
- (2) identifying shared opportunities and constraints
- (3) prioritizing common institutional strengthening needs
- (4) providing support for reform implementation
- (5) serving as a learning environment for best practices
- (6) providing a feedback mechanism for decision makers on key areas of macro-level public policy reform

▪ The Knowledge Base

Excellence, Inc. maintains an online knowledge base of strategies, best practices, case studies, training materials, templates and other tools to support Excellence Team members in driving internal reforms.

The knowledge base will be accessible by clients to facilitate the transformation process.

▪ Shared Technical Assistance

One purpose served by Common Interest Forums in each of the criteria is the identification of shared opportunities and challenges amongst participating institutions. Excellence, Inc. will contract and fund technical assistance that is identified as a priority need of multiple client institutions in one or more of the criteria. This common approach serves as a valuable means to leverage technical assistance and funding for institutional development.

Excellence, Inc. Launch Technical Assistance

Private Businesses Corner
○ Institutional Transformation
▪ Overview
<p>Excellence, Inc.’s (EI) Centers of Excellence (COE) approach aims to assist enterprises in embracing the three pillars of international best practice in business. These pillars dictate that an organization should be: (1) customer-centered, (2) results-oriented, and (3) socially responsible. The COE Program guides institutions on how to embrace these pillars, adopt a culture of excellence, and achieve certified COE status.</p> <p>EI’s COE Program facilitates transformation that is led from <i>within</i> each partner institution. The approach contains common elements that apply to all organizations, regardless of their individual missions and responsibilities or existing structures. The focus is on best utilizing an organization’s existing resources. However, by working with multiple institutions and facilitating cross-fertilization of ideas and initiatives, the COE approach is an extremely valuable tool for fostering increased efficiencies.</p> <p>A Center of Excellence is an institution recognized for its superior and ongoing operating effectiveness. A Center of Excellence has institutionalized a <i>culture of excellence</i> that embraces the three pillars of international best practice: <i>customer-centered, results-oriented, and socially responsible</i>. Five criteria — the five stars of COE certification — represent the functional areas in which an institution is assessed as to its level of accomplishment in the three pillars and, ultimately, in creating an institutional culture of excellence. A five-star Center of Excellence has achieved or surpassed the international standards for best practice in its governing functions.</p>
▪ Change Guidance
<p>Excellence, Inc. assists organizations through a process of designing, implementing, and monitoring improvements in the management disciplines of Leadership, People, Processes, Knowledge, and Finances. The Excellence Team at the organization will identify priorities for change and Excellence, Inc. experts will help manage institutional transformation to achieve the desired results.</p>
▪ Benchmarking Assessments
<p>Excellence, Inc. carries out a benchmarking assessment in each of the five management criteria. These assessments are carried out by expert assessors together with a counterpart Excellence Team member from client organization. The purpose of the assessment is to gauge the organization against international best practices, and identify strengths and areas for improvement. It also aims at transferring a heightened understanding of the three pillars of international best practice. Excellence, Inc will present a confidential gap analysis report to the Excellence Team and the leadership of the organization.</p>
▪ Common Interest Forums
<p>Excellence, Inc.’s common interest forums bring together Excellence Teams from multiple enterprises on a regular basis to discuss performance improvement ideas.</p> <p>Common interest forums serve multiple purposes, which include: (1) providing an arena for the cross fertilization of ideas across enterprises</p>

Excellence, Inc. Launch Technical Assistance

- (2) identifying shared opportunities and constraints
- (3) prioritizing common institutional strengthening needs
- (4) providing support for implementation
- (5) serving as a learning environment for best practices
- (6) providing a feedback mechanism for decision makers on key areas of macro-level public policy reform on issues of interest to business

▪ Shared Technical Assistance

One purpose served by Common Interest Forums in each of the criteria is the identification of shared opportunities and challenges amongst participating institutions. Excellence, Inc. will contract and fund technical assistance that is identified as a priority need of multiple client institutions in one or more of the criteria. This common approach serves as a valuable means to leverage technical assistance and funding for institutional development.

▪ The Knowledge Base

Excellence, Inc. maintains an online knowledge base of strategies, best practices, case studies, training materials, templates and other tools to support Excellence Team members in driving internal reforms.

The knowledge base will be accessible by clients to facilitate the transformation process.

▪ Excellence Certification

Once the client organization believes it has met the necessary criteria, it can apply for Center of Excellence Certification in one or more criteria. An assessment will be conducted by Excellence, Inc. assessors to determine the organization's status.

The assessment will result in either:

- identification of areas needing further work, and/or
- authentication as a certified Center of Excellence in one or more of the five criteria and issuance of a certificate.

The validity of the Certificate is for ONE YEAR from date of issuance

Page 6: Services

○ Strategic Planning

The strategic planning framework is a fundamental building block for the success of any organization, and is essential for successful adoption of all five excellence criteria. It also contributes directly to an institution's COE certification in the leadership criterion. For an institution to become a certified Center of Excellence, it must have a clear understanding of its vision, goals, and objectives. Excellence, Inc. offers direct assistance to support institutionalizing the strategic planning framework that embraces Specific, Measurable, Achievable, Resource-backed, and Time-bound (SMART) goals. Excellence, Inc. services also include assisting in the creation of an effective, qualitative and quantitative monitoring and evaluation system.

Excellence, Inc. assistance includes reviewing (and in some cases defining) the core functions of the institution, matching roles and responsibilities of the various departments or sub-groups, assessing how they compare to the vision of the organization, and helping institutionalize ongoing strategic analysis and benchmarking. This is especially relevant in establishing the connection between the outputs of the institution and the desired outcomes to which the institution contributes.

This service could be offered separately or as part of the COE methodology.

○ Seminars and Workshops

Our workshops and seminars span a wide variety of topics related to excellence models and best managerial and business practices. Not only do we focus on what works internationally; but we also present what worked locally and how to adopt and adapt global successes. Excellence, Inc. collaborates with renowned local and international consultants in this area.

○ Online Discussion Forums

Through our online discussion forums your organization can share experiences and learn from discussing with similar and different institutions. Our forums are open to clients as well as non-clients with the purpose of continuous learning. Excellence, Inc. experts will always be there to participate in these discussions.

○ National Awards Criteria Development, Revision, and Maintenance

Excellence, Inc. offers award and criteria development to administrators of national excellence awards. We have already contributed and will continue to contribute to the development and revision of the criteria for the King Abdullah Awards, in addition to other awards beyond the borders of Jordan.

Annex 6: Material for Website

Excellence, Inc. Website Content

Main Page

- Logo
- Selected Features:
 - Welcome to Excellence, Inc.
 - Clients Corner (used to login but not to register, as registration will be done by EXI).
 - Upcoming Events
 - Latest News
 - Polling
 - Search
 - Advertising Banner
 - Flash Area: Newsletter and Strategic Reports (to blink when a new issue is released)

About Us

Background

Excellence, Inc. is based on the Centers of Excellence (COE) program and was created, as a not-for-profit, to further COE's efforts in supporting private sector-driven economic growth. The concept was derived from four years of experience working closely with government and private institutions in Jordan, and was further developed into a comprehensive system for working with government agencies to encourage them to aspire to excellence in leadership, management and operations. Launched in 2002, the COE initiative developed a clientele of eight government and quasi-government institutions, assessed them, and gained their active participation in the implementation of the excellence methodology.

The COE program was created by the United States Agency for International Development (USAID) through its highly successful economic opportunities project, AMIR Program. Excellence, Inc. was created to sustain the initiative beyond the AMIR Program and to broaden its target market to include private firms, business associations, and other institutions inside and beyond the borders of Jordan.

In addition, Excellence, Inc. provides technical assistance for the King Abdullah Award for Government Performance and Transparency (KAAGPT). The Award supports the public sector reform program focused on providing better service for the public.

Vision & Mission

Excellence, Inc. assists public and private institutions upgrade their operations to help them effectively compete in the global economy. The firm serves as a champion of institutional excellence; guiding organizations through the design and implementation of change management programs that focus on best utilizing existing resources and that are led from within.

Excellence, Inc. spreads the concept of operational excellence and supports organizations in five key areas: leadership, people, processes, knowledge, and finances. The firm embraces its own excellence technologies to accomplish these ambitious goals just as it expects its client institutions to embrace them.

Graphic A:

Caption: Key Areas for Achieving Excellence

Excellence, Inc. Launch Technical Assistance

Our Vision

To be the model provider of international cutting edge practices to institutions seeking excellence.

Our Mission

We use proven models and international best practices to guide institutions through organizational transformation towards achieving a culture of excellence.

Board of Directors

The Board of Directors will consist of four King Abdullah Award for excellence winners (private, public, non-governmental organization NGO, business association) to ensure a rotating body of board leadership from organizations in different sectors that have demonstrated institutional excellence.

The interim board is as follows:

Walid Al Turk, chairman
JABA board

Waleed Abu Obeid, vice chairman
Mystery Shopper-King Abdullah Award

Sameer Makdah, secretary general
Jordan Clothing Company (CJC)

Subhyiah Manai
Senate member

Ghassan Nuqul
FINE

Ra'ed Bilbessi
Alliedsoft

Randa Ayyoubi
Rubicon

Amer Mowafi
Xpress Telecommunication

Our Team

Majd Abbassi

Mr. Majd Abbassi is currently CEO of Excellence, Inc., a non-profit firm based in Amman, Jordan. Previously, he successfully held senior management positions in organizations, for example Managing Director of the Institute of Management Consultants, Lead Assessor and Training Manager for Lloyd's Register, and Founder and Partner at JIT Management Consultants.

Over the last seven years, this facilitator has delivered more than 300 presentations around the globe. Delegates describe his presentations as professional, rich and original, conveying knowledge rather than information. As a management consultant and trainer, he has helped many leading organizations in their pursuit of excellence and in the achievement of high performance.

His academic background includes a Master's degree in Industrial Engineering (Management)

Excellence, Inc. Launch Technical Assistance

from Jordan University, a Bachelor's degree in Engineering from the University of Hartford–USA and QMS Lead Assessor IRCA–England. He is also an author of two popular books on quality assurance and ISO 9000 and one pocket guide of management tools.

Mr. Abbassi has worked with organizations in the Middle East, North Africa, China, Sweden and Albania, including Alstom, Arab Bank, Ajwa, LRQA, ABB, Sukar Group, Sanita, IESC, and National Paints.

Fares Dahabreh

Mr. Fares Dahabreh is the Marketing/Business Development Specialist for Excellence, Inc. He has worked as a management and quality consultant to a number of public and private sector organizations, demonstrating solid skills in project management, communication, and creative problem solving. As a business development manager in United Arab Emirates (UAE), he combined his engineering background and management expertise to develop business opportunities for international companies. He has helped design and conduct organizational assessments and implement ISO 9000 certification programs throughout the Middle East.

Mr. Dahabreh completed his Master in International Business (MIB) at the University of Wollongong in Dubai, UAE, and his B.S. in Industrial Engineering at the University of Jordan.

Tawfiq Zada

Mr. Tawfiq Zada, Technical Specialist, joins Excellence, Inc. with 10 years of experience in management consulting, organizational assessment and change management. His technical skills in designing and establishing ISO 9000 Quality Management Systems are complemented by people skills, such as diplomacy, negotiating, consensus building and interpersonal relations. Through his roles with the Jordan-US Business Partnership (JUSBP) and the British Embassy in Amman, Mr. Zada brings a wealth of experience in the field of international trade and investment.

Mr. Zada received his B.S. in Industrial Engineering from the University of Jordan and a Certificate in Personnel Practice (CPP), a postgraduate degree in Human Resource Management, from the University of Manchester in the United Kingdom.

Eyad Shaban

Mr. Eyad Shaban, Technical Specialist, comes to Excellence, Inc. with six years of experience in the financial industry. Mr. Shaban offers a strong background in strategic planning, quality management, knowledge management, and marketing. Most recently he led the Electronic Banking Services Unit for the Bank of Jordan in designing and implementing Internet banking and mobile and telephone banking. He has also prepared a number of reports and studies and served as a trainer for the Bank of Jordan in many areas, such as total quality management, marketing and the Jordanian economy. He began his career at the Jordan Investment and Finance Bank's Foreign Trade Department.

Mr. Shaban holds an MBA from the University of Jordan and a B.S. in Banking and Finance from Amman University. His publications include articles on the total quality approach to doing business, marketing for banks in the 21st century, and marketing for banks in the information age.

Rasha Bader

Ms. Rasha Bader, Technical Specialist, has worked as a management consultant for organizations such as Fastlink, a telecommunications company, and the Jordan-US Business Partnership (JUSBP), and has completed internships in Turkey and United States. Areas of focus spanned analysis for system design, process reengineering, design and implementation of management

Excellence, Inc. Launch Technical Assistance

systems, and strategic and business planning.

Ms. Bader recently received her MBA in Marketing and Strategy from Vanderbilt University, where she was a Fulbright Scholar. She also holds a B.S. in Industrial Engineering from the University of Jordan. She has participated in several international conferences and forums and is a member of Net Impact, an organization promoting corporate social responsibility.

Ola Mobideen

Ms. Ola Mobideen comes to Excellence, Inc. with four years experience in the government and private sectors. While working for Jordan Institution for Standards and Metrology (JISM), she was part of the Centers of Excellence team and led the Leadership Criterion initiative. JISM achieved first place in the first round of the King Abdullah II Award for Excellence in Government Performance and Transparency (KAAGPT). At Jordan Wood Industries Company (JWICO) she was part of the production planning and inventory control team, and had a major role in coordinating communications with customers.

Ms. Mobideen holds an M.S. in Industrial Engineering/Engineering Management and a B.S. in Industrial Engineering from the University of Jordan. She has also attended several workshops and seminars covering Total Quality Management and ISO9000.

Jennifer Hill

Ms. Jennifer Hill is the Operations Specialist for Excellence, Inc. She has three years of experience as a management and technology consultant for Accenture, specializing in the telecommunications industry. She has also managed initiatives related to the digital divide and e-government for several non-profit organizations. Her international experience includes study in France and teaching at a university in Russia.

Ms. Hill received her B.A. in Business Administration and English from Seattle Pacific University. She is currently completing her M.S. in Development Management at the School of International Service, American University.

- Projects
THIS FIELD IS TO BE UPDATED WITH OUR PROJECTS AND CLIENTS LATER ON.
- Excellence, Inc. in the News
WE’LL NEED TO UPDATE THIS WITH PRESS RELEASES AND NEWS.

Services

Public Institutions Corner

○ Institutional Transformation

▪ Overview

Excellence, Inc.’s (EI) Centers of Excellence (COE) approach aims to assist dynamic government and quasi-government entities in embracing the three pillars of international best practice in governance. These pillars dictate that modern government should be: (1) citizen-centered, (2) results-focused, and (3) transparent. The roots of these pillars, and of international government best practice, stem from the global trend in which governments are adopting appropriate private sector practices for powerfully effective governance. The COE Program guides institutions on how to embrace these pillars, adopt a culture of excellence, and achieve certified COE status. EI’s COE Program facilitates transformation that is led from *within* each partner institution. The approach contains common elements that apply to all organizations, regardless of their individual missions and responsibilities or existing structures. The focus is on best utilizing an organization’s

Excellence, Inc. Launch Technical Assistance

existing resources. However, by working with multiple institutions and facilitating collaboration and cross-fertilization of ideas and initiatives, the COE approach is an extremely valuable tool for leveraging myriad government and/or donor initiatives.

A Center of Excellence is an institution recognized for its superior and ongoing operating effectiveness in the business of government. A Center of Excellence understands its role in the greater government structure, and has institutionalized a *culture of excellence* that embraces the three pillars of international government best practice: *citizen-centered*, *results-focused*, and *transparent*. Five criteria — the five stars of COE certification — represent the functional areas in which an institution is assessed as to its level of accomplishment in the three pillars and, ultimately, in creating an institutional culture of excellence. A five-star Center of Excellence has achieved or surpassed the international standards for best practice in its governing functions.

Graphic B:

Caption: The Foundations of a Culture of Excellence

▪ Change Guidance

Excellence, Inc. assists organizations through a process of designing, implementing, and monitoring improvements in the management disciplines of Leadership, People, Processes, Knowledge, and Finances. Fundamental to success is the creation of an Excellence Team at the client institution, consisting of employees who are guided by Excellence, Inc. specialists. The Excellence Team will identify priorities for change and Excellence, Inc. experts will help manage institutional transformation to achieve the desired results.

▪ Benchmarking Assessments

Excellence, Inc. carries out a benchmarking assessment in each of the five management criteria. These assessments are conducted by expert assessors together with a counterpart Excellence Team member from client organization.

The assessment serves multiple purposes, including:

- gauging the organization against international best practice,
- identifying the organization’s strengths and weaknesses in a given criteria,
- training the excellence team members on what the assessor is looking for and why
- Transferring a heightened understanding of the three pillars of international best practice in government

Excellence, Inc. regards benchmarking assessments as a valuable gap analysis for the organization seeking to achieve excellence.

Excellence, Inc will present a confidential gap analysis report to the Excellence Team and the leadership of the organization. This report uses the analysis to identify strengths and weakness of the organization and areas of development, thus addressing areas in need of improvement.

▪ Common Interest Forums

Excellence, Inc.’s common interest forums bring together Excellence Teams from multiple government institutions on a regular basis to discuss performance improvement ideas.

Common interest forums serve multiple purposes, which include:

Excellence, Inc. Launch Technical Assistance

<ul style="list-style-type: none">(1) providing an arena for the cross fertilization of ideas across government organizations(2) identifying shared opportunities and constraints(3) prioritizing common institutional strengthening needs(4) providing support for reform implementation(5) serving as a learning environment for government best practices(6) providing a feedback mechanism for decision makers on key areas of macro-level reform (i.e. civil service regulations).
<ul style="list-style-type: none">▪ Shared Technical Assistance <p>One purpose served by Common Interest Forums in each of the criteria is the identification of shared opportunities and challenges amongst participating institutions. Excellence, Inc. will contract and fund technical assistance that is identified as a priority need of multiple client institutions in one or more of the criteria. This common approach serves as a valuable means to leverage technical assistance and funding for institutional development.</p>
<ul style="list-style-type: none">▪ The Knowledge Base <p>Excellence, Inc. maintains an online knowledge base of strategies, best practices, case studies, training materials, templates and other tools to support Excellence Team members in driving internal reforms.</p> <p>The knowledge base will be accessible by clients to facilitate the transformation process.</p>
<ul style="list-style-type: none">▪ Excellence Certification <p>Once the client organization believes it has met the necessary criteria, it can apply for Center of Excellence Certification in one or more criteria. An assessment will be conducted by Excellence, Inc. assessors to determine the organization’s status.</p> <p>The assessment will result in either:</p> <ul style="list-style-type: none">• identification of areas needing further work, and/or• authentication as a certified Center of Excellence in one or more of the five criteria and issuance of a certificate. <p>The validity of the Certificate is for ONE YEAR from date of issuance</p>
<ul style="list-style-type: none">○ Strategic Planning <p>The strategic planning framework is a fundamental building block for the success of any organization, and is essential for successful adoption of all five excellence criteria. It also contributes directly to an institution’s COE certification in the leadership criterion. For an institution to become a certified Center of Excellence, it must have a clear understanding of its role in achieving national goals and objectives. Excellence, Inc. offers direct assistance to support the process through which an institution adopts a results-focused, citizen-centered, and transparent strategic planning framework.</p> <p>Excellence, Inc. assistance includes reviewing (and in some cases defining) the core functions of the institution, matching roles and responsibilities of the various directorates or sub-groups, assessing how they compare to the vision of the organization, and helping institutionalize ongoing strategic analysis and benchmarking. This is especially relevant in establishing the connection</p>

Excellence, Inc. Launch Technical Assistance

between the outputs of the institution and the national outcomes to which the institution contributes.

Strategic thinking focuses on institutionalizing the process through which an organization creates, monitors, and updates citizen-centered and results-based strategic plans that embrace Specific, Measurable, Achievable, Resource-backed, and Time-bound (SMART) goals. Excellence, Inc. services also include assisting in the creation of an effective, qualitative and quantitative monitoring and evaluation system.

This service could be offered separately or as part of the COE methodology.

- Seminars and Workshops

Our workshops and seminars span a wide variety of topics related to excellence models and best managerial and governmental practices. Not only do we focus on what works internationally; but we also present what worked locally and how to adopt and adapt global successes. Excellence, Inc. collaborates with renowned local and international consultants in this area.

- Online Discussion Forums

Through our online discussion forums your organization can share experiences and learn from discussing with similar and different institutions. Our forums are open to clients as well as non-clients with the purpose of continuous learning. Excellence, Inc. experts will always be there to participate in these discussions.

- Benefits

The Excellence, Inc. model can greatly improve the short and long term performance of the organization and will enhance the organization's ability to:

- Fulfill His Majesty's mandate
- Participate in achieving the National Goals
- Realize the vision of the organization's leadership
- Synchronize with international best-practices
- Score well on the King Abdullah Award for Government Performance and Transparency

Services

Associations and Not-for-profits Corner

- Institutional Transformation

- Overview

The Center of Excellence approach catalyzes an internally driven pursuit of a culture of excellence amongst partner institutions. The institutional transformation services support management reforms in five fundamental areas: leadership, people, processes, knowledge, and finances. In driving these reforms and pursuing a culture of overall organizational excellence, organizations are coached on how to embrace three pillars of international best practice, that an association or not-for-profit should be (i) member-centered, (ii) results-focused, and (iii) transparent.

Excellence Inc.'s COE Program facilitates transformation that is led from *within* each partner institution. The approach contains common elements that apply to all organizations, regardless of their individual missions and responsibilities or existing structures. The focus is on best utilizing an organization's existing resources. However, by working with multiple institutions and facilitating collaboration and

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cross-fertilization of ideas and initiatives, the COE approach is an extremely valuable tool for leveraging resources and efforts and achieving increased efficiencies. Together, these services are far greater than the sum of their parts in supporting non-governmental organizations.

Graphic C:

Caption: The Foundations of a Culture of Excellence

▪ **Change Guidance**

Excellence, Inc. assists organizations through a process of designing, implementing, and monitoring improvements in the management disciplines of Leadership, People, Processes, Knowledge, and Finances. Fundamental to success is the creation of an Excellence Team at the client institution, consisting of employees who are guided by Excellence, Inc. specialists. The Excellence Team will identify priorities for change and Excellence, Inc. experts will help manage institutional transformation to achieve the desired results.

▪ **Benchmarking Assessments**

Excellence, Inc. carries out a benchmarking assessment in each of the five management criteria. These assessments are conducted by expert assessors together with a counterpart Excellence Team member from the client organization.

The assessment serves multiple purposes, including:

- gauging the organization against international best practice,
- identifying the organization's strengths and weaknesses in a given criteria,
- training the excellence team members on what the assessor is looking for and why
- Transferring a heightened understanding of the three pillars of international best practice

Excellence, Inc. regards benchmarking assessments as a valuable gap analysis for the organization seeking to achieve excellence.

Excellence, Inc will present a confidential gap analysis report to the Excellence Team and the leadership of the organization. This report uses the analysis to identify strengths and weakness of the organization and areas of development, thus addressing areas in need of improvement.

▪ **Common Interest Forums**

Excellence, Inc.'s common interest forums bring together Excellence Teams from multiple client institutions on a regular basis to discuss performance improvement ideas.

Common interest forums serve multiple purposes, which include:

- (1) providing an arena for the cross fertilization of ideas across organizations
- (2) identifying shared opportunities and constraints
- (3) prioritizing common institutional strengthening needs
- (4) providing support for reform implementation
- (5) serving as a learning environment for best practices

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<p>(6) providing a feedback mechanism for decision makers on key areas of macro-level public policy reform</p>
<ul style="list-style-type: none">▪ Shared Technical Assistance <p>One purpose served by Common Interest Forums in each of the criteria is the identification of shared opportunities and challenges amongst participating institutions. Excellence, Inc. will contract and fund technical assistance that is identified as a priority need of multiple client institutions in one or more of the criteria. This common approach serves as a valuable means to leverage technical assistance and funding for institutional development.</p>
<ul style="list-style-type: none">▪ The Knowledge Base <p>Excellence, Inc. maintains an online knowledge base of strategies, best practices, case studies, training materials, templates and other tools to support Excellence Team members in driving internal reforms.</p> <p>The knowledge base will be accessible by clients to facilitate the transformation process.</p>
<ul style="list-style-type: none">▪ YET TO COME <p>WE MAY WANT TO ADD THIS SECTION LATER, BUT FOR NOW NO CONTENT. RESERVE A FIELD</p>
<ul style="list-style-type: none">○ Strategic Planning <p>The strategic planning framework is a fundamental building block for the success of any organization, and is essential for successful adoption of all five excellence criteria. It also contributes directly to an institution’s COE certification in the leadership criterion. For an institution to become a certified Center of Excellence, it must have a clear understanding of its role, goals, and objectives. Excellence, Inc. offers direct assistance to support the process through which an institution adopts a member-centered, results-focused, and transparent strategic planning framework.</p> <p>Excellence, Inc. assistance includes reviewing (and in some cases defining) the core functions of the institution, matching roles and responsibilities of the various functions or sub-groups, assessing how they compare to the vision of the organization, and helping institutionalize ongoing strategic analysis and benchmarking. This is especially relevant in establishing the connection between the outputs of the organization and the desired outcomes for which it was established.</p> <p>Strategic thinking focuses on institutionalizing the process through which an organization creates, monitors, and updates member-centered, results-based, and transparent strategic plans that embrace Specific, Measurable, Achievable, Resource-backed, and Time-bound (SMART) goals. Excellence, Inc. services also include assisting in the creation of an effective, qualitative and quantitative monitoring and evaluation system.</p> <p>This service could be offered separately or as part of the COE methodology.</p>
<ul style="list-style-type: none">○ Seminars and Workshops <p>Our workshops and seminars span a wide variety of topics related to excellence models and best managerial practices. Not only do we focus on what works</p>

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internationally; but we also present what worked locally and how to adopt and adapt global successes. Excellence, Inc. collaborates with renowned local and international consultants in this area.
○ Online Discussion Forums Through our online discussion forums your organization can share experiences and learn from discussing with similar and different institutions. Our forums are open to clients as well as non-clients with the purpose of continuous learning. Excellence, Inc. experts will always be there to participate in these discussions.
○ Benefits The Excellence, Inc. model can greatly improve the short and long term performance of the organization and will enhance the organization’s ability to: <ul style="list-style-type: none">• Fulfill its mandate• Realize the vision of the organization’s leadership• Synchronize with international best-practices

Private Businesses Corner
○ Institutional Transformation
▪ Overview Excellence, Inc.’s (EI) Centers of Excellence (COE) approach aims to assist enterprises in embracing the three pillars of international best practice in business. These pillars dictate that an organization should be: (1) customer-centered, (2) results-oriented, and (3) socially responsible. The COE Program guides institutions on how to embrace these pillars, adopt a culture of excellence, and achieve certified COE status. EI’s COE Program facilitates transformation that is led from <i>within</i> each partner institution. The approach contains common elements that apply to all organizations, regardless of their individual missions and responsibilities or existing structures. The focus is on best utilizing an organization’s existing resources. However, by working with multiple institutions and facilitating cross-fertilization of ideas and initiatives, the COE approach is an extremely valuable tool for fostering increased efficiencies. A Center of Excellence is an institution recognized for its superior and ongoing operating effectiveness. A Center of Excellence has institutionalized a <i>culture of excellence</i> that embraces the three pillars of international best practice: <i>customer-centered</i> , <i>results-oriented</i> , and <i>socially responsible</i> . Five criteria — the five stars of COE certification — represent the functional areas in which an institution is assessed as to its level of accomplishment in the three pillars and, ultimately, in creating an institutional culture of excellence. A five-star Center of Excellence has achieved or surpassed the international standards for best practice in its governing functions. Graphic D: Caption: The Foundations of a Culture of Excellence
▪ Change Guidance Excellence, Inc. assists organizations through a process of designing, implementing, and monitoring improvements in the management disciplines of Leadership, People, Processes, Knowledge, and Finances. Fundamental to success is the creation of an Excellence Team at the client institution, consisting of employees who are guided by Excellence, Inc. specialists. The Excellence Team will identify priorities for change and Excellence, Inc. experts will help manage institutional transformation to achieve the desired results.
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- (3) prioritizing common institutional strengthening needs
- (4) providing support for implementation
- (5) serving as a learning environment for best practices
- (6) providing a feedback mechanism for decision makers on key areas of macro-level public policy reform on issues of interest to business

▪ Shared Technical Assistance

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The knowledge base will be accessible by clients to facilitate the transformation process.

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<ul style="list-style-type: none">▪ Excellence Certification <p>Once the client organization believes it has met the necessary criteria, it can apply for Center of Excellence Certification in one or more criteria. An assessment will be conducted by Excellence, Inc. assessors to determine the organization’s status.</p> <p>The assessment will result in either:</p> <ul style="list-style-type: none">• identification of areas needing further work, and/or• authentication as a certified Center of Excellence in one or more of the five criteria and issuance of a certificate. <p>The validity of the Certificate is for ONE YEAR from date of issuance</p>
<ul style="list-style-type: none">○ Strategic Planning <p>The strategic planning framework is a fundamental building block for the success of any organization, and is essential for successful adoption of all five excellence criteria. It also contributes directly to an institution’s COE certification in the leadership criterion. For an institution to become a certified Center of Excellence, it must have a clear understanding of its vision, goals, and objectives. Excellence, Inc. offers direct assistance to support the process through which an institution adopts a results-focused, citizen-centered, and transparent strategic planning framework.</p> <p>Excellence, Inc. assistance includes reviewing (and in some cases defining) the core functions of the institution, matching roles and responsibilities of the various directorates or sub-groups, assessing how they compare to the vision of the organization, and helping institutionalize ongoing strategic analysis and benchmarking. This is especially relevant in establishing the connection between the outputs of the institution and the national outcomes to which the institution contributes.</p> <p>Strategic thinking focuses on institutionalizing the process through which an organization creates, monitors, and updates customer-centered, results-oriented, and socially responsible strategic plans that embrace Specific, Measurable, Achievable, Resource-backed, and Time-bound (SMART) goals. Excellence, Inc. services also include assisting in the creation of an effective, qualitative and quantitative monitoring and evaluation system.</p> <p>This service could be offered separately or as part of the COE methodology.</p>
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<ul style="list-style-type: none">○ Online Discussion Forums <p>Through our online discussion forums your organization can share experiences and learn from discussing with similar and different institutions. Our forums are open to clients as well as non-clients with the purpose of continuous learning. Excellence, Inc. experts will always be there to participate in these discussions.</p>
<ul style="list-style-type: none">○ Benefits <p>The Excellence, Inc. model can greatly improve the short and long term performance of the organization and its successful implementation will assist the organization in:</p>

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- Realizing the vision of the organization’s leadership
- Synchronizing with international best-practices

○ National Awards Criteria Development, Revision, and Maintenance

Excellence, Inc. offers award and criteria development to administrators of national excellence awards. We have already contributed and will continue to contribute to the development and revision of the criteria for the King Abdullah Awards, in addition to other awards beyond the borders of Jordan.

Surveys

This will be accessible to registered clients whom we contact with a username and password to take the survey. We will need a system to generate usernames and passwords for surveys.

Pls refer to Dynamic Sections document for details.

- Active Survey(s)
- Archived Survey Results

Knowledge Base

This will be accessible to registered clients only. Need username and password to login. We’d like to start with this as all-accessible to registered users, but have the tool to restrict access to certain documents to selected clients.

Pls refer to Dynamic Sections document for details.

Publications

- Newsletter (should include a subscribe to our newsletter section: Name, Organization, Email)
- Strategic Reports

News

We’d like this to list the latest 10 items and allow for search by date and keywords.

Seminars and Workshops
Upcoming (up to 5 items)
Registration link The registration deadline for all courses is 3 days before the start of the course. Click here to register for a course. For additional information, contact: info@excellenceinc.org Tel: New tele # Fax: New fax #
Complete Calendar

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ISO 9000 Lead Assessor Course*	19-23 Dec 2004 5 days
BS 7799 - The Essentials of Information Security Management*	11-12 Dec 2004 2 days
BS 7799 - Information Security Management System Implementation Course*	13-15 Dec 2004 3 days
*Delivered by British Standards Institute (BSI), the world's leading management systems registrar	
Audience: All organizations Location: Le Meridien Hotel – Amman	
The Business Value of Knowledge Management	7 Dec 2004 8:00 am – 5:00 pm
Preparing and Executing General Budgets – Future Perspective	22 Dec 2004 8:30 am – 5:30 pm
Human Resources Planning; Forecasting and Succession Planning	10 Jan 2005 8:00 am – 5:00 pm
Audience: Jordanian governmental organizations participating in KAAGPT Location: Le Meridien Hotel – Amman	
Directory of Seminars THIS WILL LIST ALL COMPLETED COURSES WITH A BRIEF DESCRIPTION. TO BE UPDATED AS WE GO.	

Discussion Forums

Partnerships and Affiliations

Contact Us

Site Feedback

Annex 7: Strategic Planning Service Framework

Strategic Thinking Service:

This document outlines the Strategic Thinking Service; objectives, deliverables, and methodology. It is tailored to the specific requirements of CLIENT NAME to facilitate and assist their efforts to arrive at a strategic plan for the organization.

Objectives:

1. Introduce the organization to the fundamentals of a strategic plan and the strategic planning process
2. Guide the organization through taking a first stab at developing a strategic plan
3. Setting the ground for having an M&E system in place

Deliverables:

At the end of each session the client organization will receive:

1. High-level description of the process followed (to be provided by Excellence, Inc.)
2. Documentation of all points raised and discussed during the session (to be compiled by Excellence, Inc.)
3. A starting document on which the organization will have to build its final product (to be prepared by one representative of the client organization)

Strategic Thinking Service– Outline:

I. Pre Planning:

1. Excellence, Inc. will schedule an interview with senior management at the client organization to discuss background and general issues relevant to strategic planning.
2. The client organization is requested to form teams (as described in the assignment sections below) and provide names and details to Excellence, Inc.
3. Participants (Retreat Team) from the client organization will also be requested to complete some assignments prior to attending the retreat. The purpose of such assignments is to have participants ready to think strategically.

II. Strategic Planning:

Day 1:

1. Introductions, icebreaker, and team building (30 min)
2. Workshop fundamentals (setting the rules for the session, ensuring all participants have a say, emphasizing that Excellence, Inc. is there to facilitate not come up with the plan) (30 min)
3. Strategic planning fundamentals (60 min)
4. Developing the vision (90 min)
5. Developing the mission (60 min)
6. Coming up with some values (60 min)
7. Wrap-up and assignments for the next session

Day 2:

8. Identifying national goals that the organization embraces
9. Analysis of environment (SWOT, PEST, gaps,...)

Day 3:

10. Developing strategic objectives (2-tiered)
11. Developing sample KPIs

Day 4:

12. Refinement/Validation session with stakeholders (add/modify/clarify/show relationships)

Day 5:

13. Developing a sample functional/departmental strategic plan
14. What to do next
15. M&E fundamentals

After the completion of each session the client organization will be responsible for reviewing the results of that session and elaborating on the findings in order to arrive at a meaningful strategic plan. Please refer to assignments section below for more details.

III. Deployment and Implementation:

This covers completing the plan, communicating it to all, and acting on it. This stage is to be carried by the client organization *independently*. The end product is a comprehensive strategic plan for the organization. The client organization is expected

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to review and update its strategic plan reactively and proactively, so as to benefit from its existence and have it in synch with developments within its environment.

Preparations – To Do Before Planning an Organization-Specific Workshop:

1. Agree with client on scope of work: through what level will the workshop guide the client (do we get into how to develop plans, do we develop departmental/functional objectives, ..)
2. Ensure that the team assembled by the organization is representative. Participatory approach is the goal.

Assignments / Homework:

No	To Be Completed	Description	Tools / Recommendations	Deliverable	Main Responsibility
1	First step	<i>Evaluation Meeting</i> ¹	Items to be identified by the EXI team, and are specific to client organization	Documents requested by EXI are to be delivered or gathered and identified within the organization	CLIENT
2	Before kickoff of retreat	<i>Create the strategic planning team</i> ² : <ul style="list-style-type: none"> • Liaison Officer • Strategic Planning Team • Retreat Team • Back office Team 	Ensure that the Retreat Team is representative of the hierarchy and organizational structure of the organization and that in includes recent hires as well as experienced employees.	List of members with background information (dept, division, tenure with organization, and short bio)	CLIENT
3	Before kickoff of retreat	<i>Prepare list of relevant parties:</i> Prepare a comprehensive list of stakeholders, partners, suppliers, customers, external/foreign agencies involved, and donor agencies involved. List any preset restrictions/milestones already agreed upon with those parties.	This should be comprehensive so that it serves the strategic planning process as a whole, not only the verification with selected stakeholders.	List of relevant parties	CLIENT
4	Before kickoff of retreat	<i>Kickoff Exercise:</i> Participants think of vision, mission, and national goals	Guiding document to be distributed by EXI team	One completed form per Retreat Team member	CLIENT
5	Before day 3	<i>Refining Days 1&2:</i>	Results from Days 1&2 of the retreat		CLIENT

To be continued

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1. Evaluation Meeting is to cover:
 - Background
 - Laws, bylaws, mandate, and policies
 - Organizational structure
 - Responsibilities and scope of work of each department/unit and number of employees within.
 - Existing/obsolete strategic plans
 - Existing short-term plans (purpose of having it in place, actions, indicators, responsibilities, initiator, and time duration)
 - Annual report
 - Geographic spread of organisation (if more than one location)
 - Language to be used during the workshop
 - Language in which the final document will be published.
2.
 - a) Liaison Officer: should be able to devote some time to manage logistics and ensure that the initiative is running as scheduled.
 - b) Strategic Planning Team: should include key people from all departments of the organization and is to be responsible for the strategic planning process over the life of the organization.
 - c) Retreat Team: should include senior, middle, and lower level managers who will be involved in setting the direction of the organization. Their time commitment will be mainly during the retreat and some time back at the office to direct the Back Office Team. It is also recommended to ensure that non-managerial staff is represented on the team. This group should have somewhere between 20-25 participants.
 - d) Back Office Team: responsible for completing assignments and tasks at the discretion of the Retreat Team in order to complete work that feeds into or builds on the retreat results.

Strategic Thinking Toolkit:

No.	Session	Tools Available	Tools Added	Responsibility
1	Introductions, icebreaker, and teambuilding			
2	Workshop fundamentals			
3	Strategic planning fundamentals	<ul style="list-style-type: none">• Strategic planning presentation from Majd		
4	Vision	<ul style="list-style-type: none">• EFQM vision Sheet		
5	Mission	<ul style="list-style-type: none">• EFQM mission sheet		
6	Values	<ul style="list-style-type: none">•		
7	National goals	<ul style="list-style-type: none">•		
8	Validation	<ul style="list-style-type: none">•		
9	Environment	<ul style="list-style-type: none">• EFQM SWOT sheet		
10	Objectives	<ul style="list-style-type: none">• EFQM SMART objectives sheet		
11	KPIs	<ul style="list-style-type: none">•		
12	Sample functional/departmental plan	<ul style="list-style-type: none">•		
13	What to do next	<ul style="list-style-type: none">•		
14	M&E fundamentals	<ul style="list-style-type: none">•		

Annex 8: JGATE Assessment Report

Knowledge Criterion

JGATE

Assessment Date: October 7, 2004

A. Sub-criterion 1: Knowledge Operations

No.	Indicators	Assessment Notes
Factor 1: Awareness and Commitment		
1	The Chief Staff Executive (CSE) explained to the association what KM is, and how it relates to the strategic objectives. The association has full awareness and commitment at all levels.	The Knowledge Management criterion was written with a large, well-established organization in mind. With an organization such as JGATE, it is important to focus on knowledge sharing and team work, rather than formal KM systems. It is also necessary to ensure that all employees participate in knowledge capturing practices as relevant to their duties. The CSE is committed to knowledge management and encourages employees to share knowledge. However, there have been no formal structured meetings to explain the concept and how it relates to the overall strategy of the association. Job descriptions have no mention of knowledge sharing. Consequently, no rewards system tackles that. Some employees look for knowledge before recreating it; this is mostly a personal attribute rather than an organizational culture. It is recommended that KM concepts and practices be explained in the orientation manual for staff.
2	The CSE generally understands the concept of KM and is willing to allot the association's resources to creating, maintaining and using such a system.	
3	KM responsibilities are outlined in job descriptions, and the organization encourages knowledge sharing and teamwork through its rewarding system.	
4	The association encourages staff to check if knowledge exists before obtaining it or creating it.	
Factor 2: Planning		

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5	The CSE has appointed a knowledge manager, either formally or informally, and supports that paid employee in encouraging other employees and association members to contribute to the KM system. The CSE has designated specific individuals to support the knowledge manager by helping share, create, store and disseminate knowledge.	The organization is too small to appoint a KM manager, yet it could help if the CSE designates someone to take on that responsibility. Knowledge needs and assets can be easily identified for such a small organization, and a very simple KM strategy may help direct the organization in that effort. The association places all documents on a shared drive which is accessible to everyone. Most of the tacit knowledge has not been documented. However, due to the small size of the organization, it is not difficult to transfer knowledge through direct interaction. It is advisable though that the organization captures this knowledge in some documented form (especially those relating to reoccurring procedures) to guard against loss of knowledge when employees leave. In addition, KM could be included as an item in weekly staff meetings and addressed in the operations manual.
6	The organization has clearly identified it's KM strategic goals and translated those into objectives.	
7	The CSE, the knowledge manager, and the staff have identified and are utilizing the KM assets of the association. They have also identified gaps and plans to close those gaps.	
8	The association's KM system is clearly mapped (type, location, person), and there exists a database. The map is easily accessible to all staff and all members in multiple ways.	

B. Sub-criterion 2: Knowledge Impact

No.	Indicators	Assessment Notes
Factor 1: Knowledge Deployment		
9	The association encourages continuous knowledge sharing: <ul style="list-style-type: none"> - The CSE ensures time and space to stimulate and share knowledge, - The CSE brings employees across normal lines of responsibility to share knowledge, - The CSE holds internal staff meetings to discuss issues and topics 	No knowledge sharing sessions are being held, however the CSE is ready to provide information and direction when asked to. As mentioned earlier, a shared drive is the only means of sharing documents within the organization, and it is largely sufficient given the needs. This is well organized and easy to navigate through, although there is no defined method for how to file and locate documents on that drive. No restrictions exist on access to that drive. Even though JGATE is a small association, it is crucial to have updated and complete information about its members. Thus creation and maintenance of a member database should be considered. A database could track member profiles, usage of services, suggestions and complaints, etc.
10	The association's knowledge manager has electronic management and archiving systems	

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	external documents and vital departmental knowledge of key staff	
11	Supportive ICT is used in this area. ICT strategy is continuously reviewed.	
12	Association members and employees are adequately informed and trained to take full advantage of the KM system.	
13	Restrictions and privileges are well managed. Knowledge that is not confidential is available to all.	

Factor 2: Review and Assessment

14	The CSE and the knowledge manager regularly review the association’s knowledge assets to identify any significant gaps that need to be filled. Management and staff participation should be ensured.	Based on its size and limited time in operation, JGATE does not require a sophisticated knowledge management and ICT strategy. However, it would be beneficial to establish procedures to ensure that consultant reports and other important documents are available to the appropriate staff and Board members. In addition, JGATE may wish to restrict access to certain documents and sensitive information.
15	The CSE regularly reviews the effectiveness and assesses the usefulness of the association’s information and communications technology (ICT) strategy, inputs, outputs, and results.	
16	KM responsibilities have been agreed upon at the time of employment and practices are reviewed during appraisals.	

C. Sub-criterion 3: Communications

No.	Indicators	Assessment Notes
Factor 1: Internal Communications		

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17	The CSE has developed an internal communications strategy (objectives, messages, target audience, tools, and assessment mechanisms) and has assigned responsibility for internal communications to a specific staff employee who has the skills and the motivation necessary to plan, implement, and evaluate the strategy.	JGATE utilizes meetings as well as informal methods for internal communication with staff. Based on the interviews, it appears that no formal strategy exists. A best practice for associations is that staff communicate with staff and volunteers communicate with volunteers.
18	The paid staff employee in charge of internal communications has a clear action plan for implementing the CSE's strategy with assigned responsibility and defined tasks and timelines, for the creation and dissemination of communications materials.	
19	There is a plan to deal with crises.	
20	Are strategies, plans, and objectives regularly reviewed and updated.	
Factor 2: External Communications		
21	The association has an external communications strategy and a communications or public relations person that has the skills necessary to plan, implement, and evaluate the strategy.	External communications utilize email, fax, and phone calls. The website is also available and is being utilized. However, there is no communications strategy detailing objectives, methods, and media. Having a communications and PR strategy and work plans that are in line with the strategic plan is critical for business associations in order to deliver consistent and accurate messages and portray the correct image of the association. It would help to appoint a spokesperson as well. There is a structured plan for handling public policy advocacy contained in the strategic plan; however, employees interviewed were not aware of it.
22	The CSE has established clear guidelines for cooperation among staff for implementing the external communication strategy, which includes dealing with emerging crises.	
23	The association staff is implementing the external communication program by following its adopted strategy and adhering to its management's guidelines.	
24	The association has developed a list of issues for their public policy advocacy program.	

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25	The association staff has developed research information that is used in their public policy advocacy program.	
26	The association staff and the board of directors have developed careful strategies to implement needed changes in public policy.	

Interviewed
Personnel:
Cheryl Wilson
Jida Qamhawi
Rashed Darwazeh

**Annex 9: The Business Value of Knowledge – Presentation
Outline**

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To get us started
Take 10 minutes to put your thoughts on paper

Your understanding of KM
KM practicing at your organization

Fundamental Concepts

Data

- Structured (and sometimes unstructured) facts
- Values of Parameters
- Measures
- Attributes of things
- No significant meaning without a context

Example: (“Sami Salah”, 90/120, 200, 112365)

Fundamental Concepts

Information

- Data applied to a contextual reference of meaning or value to the business or person
- Contextual reference is represented by Metadata

Fundamental Concepts

Information

Example: Medical record:

- Name: Sami Salah
- Age: 28
- BP: 110/160
- Sugar level: 200
- Medical Number: 112365

Contextual reference is represented by Metadata

Medical record (name, age, BP, Sugar level, Medical number, etc.)

Fundamental Concepts

Knowledge

- Guides humans in their use of info and data to make judgments, decisions, and take actions
- The context of who, what, when, where, why and how to be most effective
- Compilation of already-processed relevant information and data
- The capacity to drive conclusions from information

Fundamental Concepts

Knowledge

Example: According to Sami’s medical record, a person who has medical knowledge will suggest that these are symptoms of hypertension and possibly diabetes and would know how to medicate Sami.

The Knowledge Cycle

Fundamental Concepts

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Skill

The ability to perform a certain task or to practice a certain concept

Experience

The accumulation of knowledge or skill that results from direct participation in events or activities

Wisdom

Proven confidence in your knowledge or decision-making, usually gained through experience and shared business focus

Knowledge Management

The How

- A formal structured initiative to improve the capturing, creation, distribution, and use of knowledge in an organization
- Leveraging the processes and content of intellectual capital to enhance the organization's ability to achieve its mission
- Linking people to people and people to information so that we can think together for better business results

Knowledge Management

The Why

- The art of generating value from intellectual and knowledge-based assets

Explicit and Tacit Knowledge

Explicit Knowledge

Knowledge which is codified and articulated. It appears in the form of documents, procedures and in databases

Tacit Knowledge

Knowledge that is not codified but held in people's heads. Intuitive, experiential, judgmental and context sensitive, it may be difficult to articulate

What KM is

- It is about the group memory and organizational experiences that are built through the contributions of the individuals and in turn build the capacity of the individual
- It is the means to an end; thus should be aligned with the institution's strategy
- It is about 70% people's efforts; the rest is not all technology
- It is multi-disciplinary; relates to all business functions

What KM is NOT

- It is not about quick fixes but rather about building organizational capacity; however quick wins help establish trust and buy-in
- It is not merely a huge repository of knowledge

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- It is not simply about technology and IT; It is not about archiving systems, document retrieval systems, and email

What KM is NOT (cont'd)

- It is not about over-the-counter applications; solutions should be specific and tailored to organizations' needs
- It is a business investment not a financial burden; feasibility of individual items should be evaluated
- It is not necessarily about establishing a department but is more of an organization wide undertaking

How to rally support for KM

- Start small but think incremental
 - Start on a small scale (pilot), demonstrate successes, and then apply proven techniques organization-wide
 - Helps buy-in based on successes
 - Allows for adjustments and fine-tuning without major disturbances
 - Easier to secure step-wise funding
 - Brings planning closer to implementation and achievement of results

How to rally support for KM

- Build KM into everyday business; avoid making it an extra task
- Start with the most important knowledge-oriented role/department if possible

- Secure a high-level sponsor at your organization who can always push for achievements

Business Drivers – the concept

Those highest priority strategies that significantly impact and/or set direction for programs across the organization

Business drivers provide a base on which to build direction of the organization and resolve priorities

Business Drivers - examples

- Risk mitigation
- Sustainability and profitability
- Operational excellence
- Service delivery
- Growth
- Support a culture of innovation

Business Drivers - examples

- Proactive planning for
 - Loss of corporate memory and key knowledge assets
 - Poor current succession strategies
 - Breaking down organizational and operational silos by promoting a culture of collaboration

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- Better capture, store, manage, retrieve and add value to integrated information and knowledge sets across the organization

Canadian Workplace Safety and Insurance Board of Ontario – a worker's compensation bureau*

Background

WSIB administers the province's workplace insurance and provides disability benefits to injured workers.

Founded in 1915

Employs 5,000 people

1999 revenue \$2.8 billion

1999 expenses \$2.4 billion

Serves more than 3 million workers

Sources of Information

- Employers
- Workers
- Health-care providers
- Occupational health and safety associations
- WSIB coworkers

“How much do I owe?”

How long did they need to answer that?

DAYS!

- 28 screens
- Seven applications
- Log in and out of systems
- Print out screens
- Compile data into a spreadsheet
- Tally up
- RESPOND!

Driver

To harness and use knowledge for the benefit of the front-line service, delivery teams, staff, customers, clients and health-care providers.

To benefit from former experiences and build on work already done within the Board.

Bottom-up vs. Top-down

Both approaches are in need

Bottom-up ensures participation and buy-in from those who do the day-to-day work

Top-down ensures commitment and resource allocation from top management

Bottom-up at WSIB

At WSIB the IS team initiated their Rapid Accelerated Development (RAD) Branch and their TeamWorX virtual environment

Use of the time-boxing approach: completing application development projects in phases and producing harvestables – reference documents of previous projects that are tested and proven

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Benefit: helps avoid reinventing the wheel

Bottom-up at WSIB

Successful practice was copied to include:

- Best practices
- Project templates
- Customer-selection criteria
- Standards and guidelines

Benefit: decreased the learning curve and recursive work of new team members

Bottom-up at WSIB

KM initiatives at IS saved \$1.5 million in the first year by cutting time spent on communication

Pleased with savings, Senior Management adopts practices and spreads across the organization

How the culture changed

Motivation and Reward: Heroes are those who deliver fastest – not only solve the problem

Job objectives discuss intellectual capital contributions

Everyone is ready to ask for help

Reward employees who contribute harvestables

Knowledge Management

Strategizing

Planning

Practicing

KM Strategy

- Aligned with organizational strategy
- Builds on and supports certain HR policies and strategies
- Cuts across all functions, and cannot survive as a stand-alone achievement

Knowledge Management

A big name for something you are already doing!

- Do you send employees to training?
- Do you hold briefing meetings?
- Do you communicate information to your clients?
- Do you organize & archive your information?
- Do you recognize knowledge-sharing workers?
- Do you fully utilize the experience of employees?
- Do you utilize teams?
- Do you implement an intern program?
- Do you implement succession planning?
- Do you solicit feedback from employees and external parties?

Before you Set off, Think:

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- What knowledge is important to your organization?
- How are you planning to use it? And when?
- Is it available within the organization? In what form? Where?
- To what extent do you utilize available knowledge?
- What knowledge are you trying to collect?
- Where can you get unavailable knowledge from? In what form? And how?

KM Operations

- It is important to understand KM and its impact on the organization
- KM is facilitated through practices and tools
- Amongst the effective KM tools is technology; KM is not just about technology
- ERP, CRM, MIS, BIS, DSS, Expert systems, Data mining, etc. are all tools that facilitate knowledge capture, creation, discovery, utilization, and sharing

KM Operations

- KM Planning
- KM Vision
- Aligned Outcomes
- Aligned Strategy
- Implementation plan
- Assessment and evaluation mechanism

KM Operations

- Knowledge capture and transformation
- Knowledge sharing
- Knowledge utilization
- Knowledge generation
- Knowledge operations evaluation and adaptation

KM Operations

"the human factor (the tacit knowledge source) has the biggest potential for yielding tangible results, while systems mostly deal with explicit knowledge sources for collection, storage, and manipulation"

Case Study

Ministry of Education - Jordan

Case Study: MoE

- Over 65,000 employees
- Over 1,250,000 students
- Over 3000 schools
- 12 directorates
- Complex organizational structure

Case Study: MoE

- Technology in action:
 - Many schools were equipped with PCs
 - PCs were locked in storage rooms
 - Teachers were afraid of touching the expensive machines
 - Students rarely had the chance to use the PCs
 - Eventually the fact was realized:
- Technology is merely a tool and cannot be a complete solution

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Case Study: MoE

- ERFKE
- MoE officials realized that human resource development is the key to support KE
- Efforts were refocused on HRD:
 - ICT literacy training
 - In class technology utilization
 - E-content development
- The successive deployment of technology had a much greater impact since it was deployed as a tool to achieve the desired results

Case Study: MoE

- Lessons learned:
 - Technology is simply an effective tool when properly deployed
 - Secure support to KM before starting
 - Follow an incremental approach
 - Assess and reevaluate periodically and systematically
 - Reward endorsement of KM operations
 - Populate success stories

The Local Context - Challenges

- Frequent changes in leadership and governmental structures
- Limited resources (financial)
- Weak incentive systems
- Resistance to change
- No reward for creativity
- Legislative barriers
- Lack of systematic HRD activities
- Etc.

The Local Context - Opportunities

- A high level commitment to excellence
- The global trend advocates positive change
- Better readiness to understand KM
- Some local success stories are proving the value of KM
- The term “KM” is becoming more popular, even if misunderstood in many cases
- Availability of technological tools which are underutilized in many cases
- Moving towards merit-based recruiting

The Local Context - Risks

- Copying and implementing a wrong strategy
- Undesired results which condemn KM rather than the worn approach
- Using KM for self promotion and benefits by leadership
- Could lead to resistance to the concept because it is not outcomes oriented

The Local Context – Risks (cont'd)

- Hit them with it at once; i.e. comprehensive implementation of KM strategy
- Overwhelming the employees with KM practices which may lead to drop in productivity and performance
- Again, could be used to condemn KM
- Exaggerating the role of technology in KM operations

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– Could lead to ignoring the human aspect which could lead to failures, once again KM could be blamed.

Wrap-up and Best Practices

- What is then KM?
- Where would you start?
- What are the impediments at your org?
- Can you identify already applied KM operations?
- Can you think of a KM sponsor at your organization?
- Does KM enjoy political support at your org?
- DO YOU REALLY BELIEVE THAT KM WORKS?

Best Practices

- Think big but apply incrementally
- Assure management commitment to operational Excellence: Showcase quick wins that can be attained through KM
- Identify challenges and risks early on and try to deal with them (proactive risk management)
- Develop a system (not a tool only) for identifying working knowledge & capturing best practices

Best Practices

- Standardize and streamline processes across the organization
- Deliver critical working knowledge to employees when needed anywhere, anytime
- Make your KM strategy as dynamic as possible in order to adapt to changes, developments, and to tune it according to the impact measurements
- Monitor and measure results (impact assessment)

KAAGPT

Knowledge Management Criterion

OBJECTIVE OF CRITERION

Assess an organization with respect to:

- Comprehension of concept
- Resource-management strategy
- Effectiveness in achieving goals
- Building trust and cooperation

OPERATIONS –

AWARENESS AND COMMITMENT

Understand how KM supports achieving goals and how it relates to overall organizational strategy

Staff:

Understanding of importance for overall goals

Understanding of importance for the job

Senior management :

Commitment represented by allocation of resources

Relating KM responsibilities to job descriptions and appraisals

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Visibly rewarding and recognizing team work and knowledge sharing
OPERATIONS - PLANNING
Clear documented strategy and appropriate infrastructure

Design:

Identified assets, requirements, priorities and action plans
Identified risks and designed reactive and proactive measures
Identifying how knowledge contributes to outputs

Implementation:

Maintain a database/knowledgebase of knowledge assets
Easy-to-use, continuously updated system
Dedicated team (primary function)

IMPACT – KNOWLEDGE DEPLOYMENT

Flexible knowledge mapping is in place:
Mind mapping
Identify resources
Support with ICT
Continuous revision and updating of knowledge

Explicit:

Document management and archiving

Tacit:

Make tacit knowledge available in a useable format (e.g. gatherings)

IMPACT – REVIEW AND ASSESSMENT

Organizational behavior:
Organization needs
Strategies and targets
Systems and capabilities
Technology

Individual behavior:

Ensure organization-wide participation and understanding
Relate knowledge sharing to performance reviews
Reward knowledge sharing

COMMUNICATIONS – INTERNAL

Identification of purpose and audience:
Organization-wide, timely awareness and feedback:
What other departments do
Successes
Issues and challenges
Solicitation of employee feedback

Communication plan:

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Resourced
Flexible and consistent
Responsibilities, media, and timeline outlined
Centralize or coordinate communications

COMMUNICATIONS - EXTERNAL

Identification of purpose and audience:
Builds trust and a positive public image
Serves public outreach
Surveys stakeholders

Communication plan:
Flexible and consistent
Resourced
Responsibilities, media, and timeline outlined
Test communication tools to ensure effectiveness
Centralized (have a PR or communications department)
Coordinate with partner organizations
Archiving of external communication documents

KM BOOSTING THE CULTURE

KM STRENGTHENING THE 3 PILLARS

Citizen-centered organization –

Ensuring accessibility of information in a readily useable format

Information should be timely, relevant, and accurate

KM STRENGTHENING THE 3 PILLARS

Results-focused organization –

Enhancing the decision making process

Providing right info, at the right time, to the right person, in the right format

KM STRENGTHENING THE 3 PILLARS

Transparent organization –

Building stakeholders' trust in the organization

To ensure employee cooperation, and build trust with external entities

Annex 10: KM Mapping – Presentation Outline

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Al-Fayoumi, 2005
Knowledge Mapping: A Practitioners' Approach
January 19, 2005

Outlines

- Introduction
- The basic elements of a knowledge map
- How to decide what way would be best to organize your knowledge map
- How to decide sources of organizational knowledge
- Exercise (knowledge map)
- Introduction to mind mapping
- Mind mapping best practices
- Exercise (mind map)
- Discussion and Conclusions (Once developed, how to update and use knowledge maps)

Knowledge Mapping

“ An ongoing Quest to discover and maintain the locations, the natures, the ownerships, the interrelationships, the values, and the utilizations of knowledge assists including expertise, skills, information, applications, and identify respective constraints, challenges, and opportunities.”

Knowledge Mapping

- Knowledge mapping is simply a mechanism to identify the knowledge sources, types of knowledge, knowledge locations, sharing channels, interrelationships, and possible applications.
- Requires specialized organizational knowledge.
- It is used to know what knowledge is available, where, in what form, when it can be used, and what is needed.
- It takes allot of effort to study, evaluate, assess, analyze, and verify the available knowledge

Elements of a Knowledge Map

- Knowledge sources: People, Databases, repositories, libraries, media, etc.
- Knowledge users: knowledge workers, citizens, managers, software packages, etc.
- Interactions, relations, and flow.
- Knowledge sinks: receive knowledge but do not transmit proportionally.
- Knowledge Transmitters: transmit knowledge
More than they receive.

Sources of Organizational Knowledge

- Managers
- Employees (old and current)
- Archives
- Policies and regulations
- Transactions
- Information systems
- Clients
- Other stakeholders

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Knowing what/where/who

- Surveys
- Formal and informal interviews
- Org. charts
- Reports & documents
- Job descriptions if any
- Brainstorming meetings
- Mining and visualizing data and exploring patterns
- Tracking events and transactions

Knowledge Mapping Approaches

- Process-based knowledge mapping (serviceoriented)
- Hierarchical mapping (Task-oriented)
- Network Knowledge mapping
- Concept (Mind) Mapping: What a concept means
- Competency Mapping: Who knows what
- Social Network Mapping: knowledge sharing patterns and directions

Al-Fayoumi, 2005

Process-Based K Mapping

- Focuses on process-related knowledge
- Service-oriented approach
- Requires well-defined processes
- Requires clear job descriptions and responsibility matrices
- The results are usually very clear and can help:
 - Pin point weaknesses in a process
 - Acquire needed knowledge (create or develop)
 - Simplify the process
 - Restructure or enhance the process
- Requires little maintenance and update, usually when processes are modified, restructured, or created

Hierarchical Mapping

- Based on specific persons according to the organizational structure
- Shows knowledge status in an organization regardless of performance
- Depicts skills and competencies, and some times lack of those
- It is simply a snap-shot of the organizational knowledge
- Does not usually take processes into consideration (becomes very complex)
- Serves as a tool for:
 - Identifying general knowledge gaps
 - HR development and recruitment
 - Organizational restructuring
 - Measuring organization's abilities and limitations
 - Unveils interrelations and knowledge flows
- Volatile and changes rather quickly with change of people and structure .. requires frequent update

Concept (Mind) Mapping

- Random graphical representation of a certain concept

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- Used to summarize a concept and exploit all information and knowledge surrounding it
- Used to better understand a concept and transfer knowledge about it
- It exploits, facts, knowledge artifacts, linkages, flows, components, etc.
- There are tools that facilitate Mind Mapping

K Maps Formats

- Graphical: represents knowledge using figures, lines, and text
- Matrix: represents knowledge in a two dimensional matrix showing knowledge sources and types of knowledge those hold
- Knowledge-Collaboration score cards: a card for each knowledge source describing the types of knowledge it holds and the linkage with other sources.
Can be easily transformed into a graphical format.
- Etc.

Challenges

- Identifying skill and proficiency levels
- Identifying Interrelationships
- Convincing people to use K maps
- Choosing the right method of K mapping
- Maintaining a K map
- Convincing managers to plan according to K maps
- Simplifying K maps

Pitfalls to avoid

- Believing K maps are the ultimate goal
- No purposeful Questions (i.e. stupid questions, sorry!!)
- Not Knowing Why you are K mapping!
- Not ensuring both reliability & validity
- Not assessing and testing the results accurately
- Over using K maps
- Using K maps to persecute people
- Not frequently updating K maps

Academy K Map

Training manager

GM

Prog. Coordinator Sales Manager

Trainer1

MCSE

Weak

English

Good networking

MCSE

Course training reports

Directions and rules

Course names

Course schedule

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Suggested Courses

FMS

CRM

Invoicing

Acc. Payable,

Acc. Receivable

Registration

Reports, status, follow ups, etc.

Senior sales

Test Admin

Acc. Mngr

No Start. Planning

Good communicator

MCSE connections reliable

Exc. Tech. writer

Exc. communicator

Good planning

Cisco security

Good Mentor

Training

Database

Good Strategic Planning

Good leadership

Little financial skills

Good academic knowledge

Advanced comm. skills

Good network in Gov. Ok Negotiation

Stores invoices, AP, AR, etc.

Stores customer req. info, etc.

Stores trainees data, grades, etc.

Telecom network weak tech. writing

CLIENTS

Graphical K Mapping

Policy Policy

Academy K Map

Salah Salem

Ali Ahmad

Name

Non

2nd

4 Finance

1 Basic IT

Moderate

Arabic, little English, and no technical writing

Good Arabic, weak English, weak vocabulary

High impact because...

Moderate:

explain

Non

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B.Sc. In finance
Friendly, chats often, etc.
Formal, no documentation, etc.
3 Management
Written Verbal Function
Contribution
3rd 1st Soc. Prof. Level
1-5
Type
Etc Communication Impact Degrees Behavior Skills
Tabular K Map

Process-Based Mapping
Gov. Training
-Course selection
-Nomination
-Trainee Selection
-Matching
-Registration
-Confirmation
-Scheduling
-Training
-Monitoring
-Certification
Skill requirements
Inputs Outputs
Curricula
Training abilities
nominations
Responsibility
assignment
Acquired skills
Training reports
Course evaluations
Certificates
Feedback and
recommendations
When processes are Known

Social Network Mapping
Sami
Niveen
Huda
Subhi
Amal
Kamel
Jack
Ali
Rula
Harbi

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Khadra

Dislike & no comm.

Dislike but prof. comm.

Prof. team work

Formal comm.

Likes & prof. comm.

Informal comm.

comm. required

Exercise: Develop a Simple K Map

- Choose a K mapping format
- Start with key functions (depts. & positions) of the org.
- Identify key sources of Org. knowledge
- Draw relations between knowledge sources
- Identify knowledge usages (and users)
- Mark knowledge sinks
- In conclusion, try to identify at least 5 specific knowledge gaps (according to your org. objectives)

Mind Mapping

- Unstructured visual illustration for quickly summarizing a concept and all related facts and objects
- It can be used to map an object, an event, a process, an activity, or a concept
- Should be simple, readable, illustrative, and direct

How to Mind Map: Best Practices

- Use just key words, or wherever possible images.
- Start from the center of the page and work out.
- Make the center a clear and strong visual image that depicts the general theme of the map.
- Create sub-centers for sub-themes.
- Put key words on lines. This reinforces structure of notes.
- Print rather than write in script. It makes them more readable and memorable. Lower case is more visually distinctive (and better remembered) than upper case.

Cont. Best Practices

- Use colors to depict themes, associations and to make things stand out.
- Anything that stands out on the page will stand out in your mind.
- Think three-dimensionally.
- Use arrows, icons or other visual aids to show links between different elements.
- Don't get stuck in one area. If you dry up in one area go to another branch.
- Put ideas down as they occur, wherever they fit. Don't judge or hold back.
- Break boundaries. If you run out of space, don't start a new sheet; paste more paper onto the map. (Break the 8x11 mentality.)
- Be creative. Creativity aids memory.
- Get involved. Have fun.

Mind Mapping Map!!

Exercise: develop a Mind Map for one of your major processes

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We have it, What do we do with it ?

- Use it to perform Knowledge gap analysis (Current K Map, desired K map)
- Plan HR functions around the K map:
 - Adjust job descriptions according to K maps
 - Recruit according to K maps
 - Design incentives according to K maps
 - Etc.
- Form team according to K maps
- Buy systems to facilitate dynamic Knowledge mapping
- Revise K maps frequently

Conclusions

- Knowledge Maps are important
- Never attempt to undertake KM activities without a K map
- Knowledge changes frequently and K maps must be dynamic enough to cope
- Use K maps to:
 - Key knowledge sources
 - Identify knowledge interactions
 - Identify weak spots
 - Knowledge gaps
 - Information requirements

Continued: Conclusions

- In large organizations, divide and conquer: develop partial knowledge maps and then integrate them
- Knowledge maps must be clear and readable
- You must know why you're mapping knowledge
- You must USE knowledge maps
- You must measure the impact of knowledge maps
- You must update knowledge maps

Open Discussion

THANK YOU