

aidóni

CONSULT  
KM  
INTERNATIONAL

# KNOWLEDGE MANAGEMENT for Organizational Growth

**Guidance for aidóni and Similar  
Small and Emerging Non-Profit  
Organizations**



**Prepared by:** Barbara Fillip, Senior Knowledge Management Consultant, and  
Nikola Turière, Junior Knowledge Management Consultant, Consult KM International

# Contents

<b>1. Executive Summary</b>	<b>4</b>
<b>2. Introduction</b>	<b>4</b>
<b>3. Knowledge Management for Effective Human Resources Management</b>	
3.1 Integrating Knowledge Management within a Volunteer-to- Employees Maturity Model	6
<b>4. Knowledge Management for Fundraising, Sustainability, and Impact</b>	
4.1 Integrating Knowledge Management within a Resource Mobilization Maturity Model	12
4.2 Applying Knowledge Management to Fundraising Strategies	14
4.3 Applying Knowledge Management to the Proposal Development and/or Grant Application Process	16
<b>5. Strengthening Organizational Strategy and Work Planning with Knowledge Management</b>	<b>18</b>
5.1 Embedding KM in an Operations Manual	18
5.2 Role of an Operations Manual	19
5.3 Technology Roadmap Outline	21
5.4 Measuring Effectiveness, Operational Efficiency, and Broader Impact	22
5.5 Beyond Metrics - Capturing Lessons Learned	25
5.6 Simple guidance for documenting lessons learned at the emerging stage of maturity	26
<b>6. Appendices</b>	<b>27</b>
Appendix A. Knowledge Management Resources	27
A1. Knowledge Management Framework	27
A2. Knowledge Management Resources for Nonprofits	30
A3. Nonprofit Support in Europe	31
A4. Maturity Models	31
A5. Resource Mobilization Resources	32
A6. Technology Roadmaps/Technology Maturity Models	32
Appendix B. Nonprofit Management	33
B1. Embedding Knowledge Management in Operations	33
B2. Fundraising Options List	36
B3. People Management: Leadership, Knowledge Gaps and Continuous Learning	39
B4. Social Entrepreneurship	41
Appendix C. Technology	43
C1. Technology Roadmap	43
C2. Google-based intranet with secure Google drive	44

# Acknowledgement

This report incorporates content that was produced with the aid of ChatGPT, an advanced natural language generation model developed by OpenAI. ChatGPT was used as a writing assistant to generate drafts for certain sections. All content generated by ChatGPT underwent a comprehensive review and editing process by the author(s) to verify its validity, reliability, and pertinence to the subject matter.

# 1. Executive Summary

This report provides a framework for embedding Knowledge Management within aidóni's operations as a strategy to support organizational growth that will allow the organization to achieve its potential and continuously improve how it fulfills its mission.

For the purpose of this report, we define organizational growth as an increase in capabilities rather than a specific target in terms of budget or number of volunteers or employees. Our assumption and starting point for this effort is a strong belief that

Knowledge Management can provide strong benefits to emerging nonprofits. The approach presented is based on a simple maturity model which allows reinforcing feedback loops to move the organization along a balanced growth roadmap, fully embedding Knowledge Management within all aspects of the organization from the very early stages of organizational development so that it becomes the normal way of doing work rather than an additional activity.

## Our key recommendations are as follows:

- Embed Knowledge Management throughout, as part of the organization's DNA. The primary mechanism for operationalizing this recommendation is the development of an **Operations Manual** that integrates Knowledge Management in all aspects of the organization's processes.
- Apply a maturity model approach to enable controlled, balanced growth of all "systems" in parallel. Consider a 1-year (stage 1), 3-year (stage 2) and 5-year horizon (stage 3) for growth. These three time horizons can be adjusted but correspond to three levels of organizational maturity (emerging, developing, mature) which are used throughout the report. This includes the development of a **technology roadmap** aligned with the maturity model.
- Tackle immediate challenges strategically, taking a long term view rather than looking for shortcuts and short-term solutions. Start small and focused, with a realistic, yet comprehensive approach.

The first section of the report introduces an approach to integrating Knowledge Management and the proposed maturity model in support of human resources management. The second section focuses on integrating Knowledge Management to support fundraising, sustainability, and impact. The third and final section highlights how Knowledge Management can be embedded throughout to strengthen organizational strategy and work planning.

Appendices provide additional resources and more details to avoid crowding the main report and recommendations. Finally, a separate document consolidates information most relevant to immediate implementation of the recommendations in Stage 1: **Integrating Knowledge Management in an Implementation Plan for Stage 1.**

# 2. Introduction

aidóni is in the very early stages of development, full of energy, ideas and ambition, planning for growth, seeking funding and planning to hire its first full time staff. Led by the passion and commitment of its founder, the organization is facing a number of immediate and longer-term challenges and opportunities. This report, developed based on conversations with the founder and the team, is specifically directed at aidóni, but admittedly could provide guidance to a broad range of nonprofits

facing similar circumstances. In the early stages of development and growth, a nonprofit is likely to face rapid changes. This is typically accompanied by a need for great flexibility and adaptability. This is why we are offering a framework and general guidance rather than a more prescriptive approach. We strongly believe that aidóni will be able to take and adapt this framework as appropriate and as the needs of the organization evolve.

For now, we identified the following as key elements to address:

- A need for consistency in communications and guidance to volunteers, which will evolve, in time, to a broader approach to human resources management.
- Technology requirements associated with document management, the needs of a geographically dispersed workforce, and unique security concerns.
- A desire and expectation for rapid growth, accompanied by a significant focus on resource mobilization with a focus on fundraising and hiring.
- All this leads to anticipated requirements related to overall operations and the standardization of processes in a continuous learning loop.

## Why a focus on Knowledge Management?

Knowledge Management is essential for small nonprofit organizations like aidóni. In fact, it is critical that small organizations, often relying on volunteers and very limited resources, make the most of these resources by using Knowledge Management to streamline onboarding, enhance collaboration, and ensure continuity in the face of volunteer turnover and a transition to more permanent, paid staff. By

fostering a learning culture and promoting knowledge sharing, Knowledge Management contributes to capacity building, resource optimization, and the development of effective fundraising strategies. Moreover, a robust Knowledge Management system enables accurate monitoring and evaluation, crucial for demonstrating value to stakeholders and guiding future growth.



### Knowledge Management - Definition

Knowledge Management (KM) is the systematic process of collecting, organizing, sharing, and applying an organization's collective knowledge to achieve its goals. It focuses on leveraging the experiences and insights of individuals to improve decision-making, learning, and innovation within the organization.

# 3. Knowledge Management for Effective Human Resources Management

Based on the information gathered from aidóni, the organization aims to reduce its dependence on volunteers and establish a long term strategy to ensure sustainability and impact. This section focuses on **how Knowledge Management can support aidóni's growth in terms of effective human resources management**.

In this section, KM's role is both to ensure effective human resources management and to ensure a transition from a 100% volunteer-based team (aidóni's current state), to a reduced reliance on volunteers and increased use of freelance contractors and core

employees. This is why we choose to apply a maturity model to increase capacity for human resources management over time, focusing on a) understanding the human resources lifecycle (from recruitment to offboarding) and b) building capacity of the workforce and fostering a learning culture. The maturity model shows the transition from 100% volunteer-based, to a reduced reliance on volunteers and more use of freelance contractors and core employees. This Maturity Model uses 3 futures forecasting, a 1-year (stage 1), 3-year (stage 2) and 5-year horizon (stage 3) for growth (see details about the Maturity Model we are using throughout this report).

## 3.1 Integrating Knowledge Management within a Volunteer-to-Employees Maturity Model

A Volunteer-to-Employees Maturity Model for a small non-profit can be defined in three stages, with each stage representing a level of maturity in the organization's transition from 100% volunteer-based, to a much lower reliance on volunteers and more use of freelance contractors and core employees. Of course, we understand the importance of funding in the process of transitioning from a heavy reliance on unpaid volunteers to relying on a growing cadre of paid freelancers and a core of permanent paid

employees. You will find more information about it in the next section.

Knowledge Management can be integrated into the Volunteer-to-Employees Maturity Model at each stage to enhance the organization's ability to learn, adapt, and improve in order to attain its strategic objectives by relying on paid specialists rather than on volunteers. Here's a possible breakdown of the stages and integration of Knowledge Management:

### Stage 1: Year 1 – Emerging

At this stage, the non-profit is in its infancy and focuses on establishing the organization's foundation, structures, and basic systems. We assume the following team composition for this stage: 70% of volunteers; 30% of freelance contractors and no core employees.

- **Identification of human resource needs:** Develop a clear understanding of the human resources required for the organization's mission and objectives as well the roles and responsibilities of the existing volunteers.
- **Setting-up screening processes for volunteers and freelance contractors onboarding:** Writing comprehensive job descriptions by clearly outlining the responsibilities, required qualifications, availability and skills for each position. Developing cover letter and resume screening processes as well as methodologies for interview processes to identify and select profiles. Create a "Careers" page on the website to advertise open positions.

- **Onboarding:** Develop Digital Tools Guide for volunteers as an onboarding handbook for volunteers. Initially, this would a) provide clear guidance around when to use what tool; and b) the minimum requirements for use; c) “how to” guidance. Develop materials and documentation to present aidóni, tasks, missions’ objectives and work allocation once the candidate is hired. Familiarize them with your organization’s culture, values, and processes. Offer guidance and resources to help them integrate into their roles effectively. Provide necessary training and support.
- **Offboarding Volunteers:** as volunteers inevitably leave, a system has to be implemented to make it more “competitive” and rewarding to be an aidóni volunteer, such as exit interviews (to acknowledge their contributions and express gratitude for their service) or setting up duration of volunteering. If applicable and desired from both sides, provide opportunities for volunteers to transition to paid roles (first as Freelance Contractors).
- **Engagement/shared learning/communications:** New volunteers can be assigned a “Volunteer Buddy”, someone who has been a volunteer for a while and can answer basic questions. This could be part of a model to build aidóni internal networks as well as to make internal communication easier.

## Knowledge Management Integration

- **Monitor and evaluate the transition:** Continuously monitor and evaluate the effectiveness of the transition. Collect feedback from Volunteers and newly hired Freelance Contractors, to identify areas for improvement and make necessary adjustments. Create a simple volunteer handover document to be filled by volunteers and others upon leaving their position. For long-term volunteers leaving, create an enhanced exit interview to capture their key lessons
- **Knowledge repository:** Create an intranet with secure Drive/SharePoint with access on the website to access all aidóni internal documents and (private) data, drafts and organization related documents. Consolidating access to all key materials will facilitate coordination and collaboration as aidóni grows. The information architecture or way in which the documents are organized will become critical as the number of documents increases. The goal should be that any document can be found within three clicks or less.
- **Leverage time zone converters:** To maintain awareness of volunteers schedules and availability, gather in an Excel sheet localisations and local time of each Volunteer in different parts of the world.
- **Create a culture of knowledge sharing:** This can initially be done informally within existing meetings but it is important to start this habit early, creating the right expectations and culture of knowledge sharing.

We recommend a Knowledge Management approach that is fully embedded in the organization’s operations and therefore fully embedded in an Operations Manual (see details).

## Stage 2: Year 3 – Developing

At this stage, the non-profit is focused on growth by giving more room to paid employees and developing more sophisticated resource mobilization strategies. Delegate work and tasks will be the norm as the organization will deal with more people. We assume the following team composition for this stage: 30% of Volunteers; 50% of Freelance Contractors and 20% of Core Employees.

- **Onboarding volunteers:** as the number of volunteers decreases, it is important to know that replacing volunteers becomes a different process. Motivational factors will likely change and it is important for aidóni to continue to provide the kind of experience that volunteers are looking for, such as professional development, equivalent to an internship, a step towards employment and clearly define it. It can be part of an international programme, an exchange programme or a partnership with different organizations.

- **Diversifying type of people working in the organization:** recruitment and screening process (for all kinds of people working in the organization) might be reinforced and clearly well developed at this stage.
- **Strategic planning:** Develop a multi-year strategic plan that outlines the organization's goals and human resource needs in parallel on the financial resources.
- **Establishing clear contracts and agreements:** When engaging people, develop clear and detailed contracts that outline expectations, deliverables, payment terms, and any confidentiality or intellectual property agreements. Ensure that the agreements align with local laws and protect the interests of both parties.
- **Develop a recruitment strategy:** Determine how you will attract and select freelance contractors and core employees. Consider using online job boards, professional networks, recruitment agencies to find qualified candidates. Tailor your recruitment strategy to the specific roles you are hiring for and emphasize the benefits of working with your organization.
- **Capacity building:** Invest in training to improve the effectiveness of work of people. It can be a way to launch a retention strategy as well as to make volunteer's experience rewarding.

## Knowledge Management Integration

- **Monitor and evaluate the transition:** Continuously monitor and evaluate the effectiveness of the transition. Collect feedback from the new contractors and employees, as well as from any remaining volunteers, to identify areas for improvement and make necessary adjustments.
- **Expand offboarding processes:** Apply tailored offboarding processes to the three different types of staff to collect feedback on experience, improve lesson learning capture and inform decision-making. Revise the handover document as needed and integrate a review of the handover document in the exit interview process.
- **Organizational learning processes:** Enhance ongoing organization learning processes by developing short minutes after dedicated team or department meetings. Start a practice of asking "What have we learned from this experience?" or include a Lessons Learned item in the template for meeting agendas.
- **Cross-functional collaboration:** Facilitate communication and collaboration among different teams and departments to share knowledge and insights regarding the shift from a fully volunteer based organization to only relying on contractors and core employees.
- **Training and capacity building:** Develop and implement training programs that incorporate Knowledge Management principles to improve staff and volunteer skills in their daily work regarding internal communication, access to data and documents, and understanding of the organization.

## Stage 3: Year 5 – Mature

At this stage, the non-profit is established and focuses on long-term sustainability and is maximizing human resource mobilization efforts. Relying on Volunteers is no more an organizational standard as most people working within the organization are now paid for their work. We assume the following team composition for this stage: 10% of Volunteers; 50% of Freelance Contractors and 40% of Core Employees.

- **Developing a retention strategy:** implement strategies to improve the effectiveness of work and human management (Volunteers, Freelance Contractors and Core Employees), team building. This strategy aims at building a team of Core Employees to work in the long term and to define the duration of contract for Freelance to plan future team growth composition regarding the needs of the organization.
- **Evaluation and continuous improvement:** Regularly assess the effectiveness of resource mobilization efforts and adapt strategies as needed.
- **Robust team management:** Strengthen human management systems and processes, including human resources, recruitment, offboarding, working methods, resources sharing and lesson learning.
- **Capacity building:** Continue the investment in training to improve the work of all people working in the organization, make their experience valuable, meaningful and in accordance with the organization's values.

## Knowledge Management Integration

- **Monitor and evaluate the transition:** Continuously monitor and evaluate the effectiveness of the transition. Collect feedback from the new contractors and employees, as well as from any remaining volunteers, to identify areas for improvement and make necessary adjustments. Adjust the exit interview and handover document as needed.
- **Robust sharing, communication and learning culture:** Building on the previous steps, foster a culture of continuous learning and improvement by encouraging staff and volunteers to continuously share knowledge, experiment with new ideas, and learn from experiences.
- **Advanced knowledge sharing platforms:** Implement advanced tools and systems for capturing, storing, and disseminating knowledge related to staff and volunteer management, working methods or lessons learnt.
- **Knowledge Management strategy:** Building on previous steps, experiences of volunteers, freelance and core employees, develop and implement a comprehensive Knowledge Management strategy that aligns with the organization's resource mobilization objectives and guide efforts to capture, store, and share relevant knowledge.
- **External knowledge sharing:** Engage with other nonprofits, networks, or associations to share best practices, lessons learned, and innovations in resource mobilization, promoting a broader culture of learning within the sector.

The proposed Maturity Model can be summarized in the table below. It presents the evolution of volunteers, freelance contractors and core Employees percentages in aidóni's team from now to the last stage of the Maturity model (Stage 3 - Year 5). These rates are only approximatives and a further financial analysis might be conducted regarding the organizational strategy until now to 2028. The annual milestones presented below are attaching

more importance to Freelance Contractors as they present more flexibility for aidóni regarding financial expenses, allocated tasks, or administrative workload. Thus, regarding whether aidóni would like to rely more on freelance contractors or on core employees, the last two columns can be reverted. However, for organizational growth purposes, we recommend a solid base of core employees as it can ensure a strong human resource stability for aidóni.

Stages	% of Volunteers	% of Freelance Contractors	% of Core Employees
Now	100	0	0
Year 1	70	30	0
Year 2	40	40	10
Year 3	30	50	20
Year 4	20	50	30
Year 5	10	50	40

The accompanying information architecture and collaboration tools supporting volunteer management is further detailed in the Technology roadmap section.

Each stage in the Volunteer-to-Employees Maturity Model builds upon the previous one, allowing the organization to grow and become more effective to transition out to relying on volunteer work to achieve its mission. The Knowledge Management capabilities grow alongside the organization, supporting organization development.

Integrating Knowledge Management into the Volunteer-to-Employees Maturity Model helps the organization to continuously learn and adapt its strategies, ultimately leading to more effective working methods and a sustainable model to grow and develop its efforts over time. For additional suggestions see this section in the Appendix.

# 4. Knowledge Management for Fundraising, Sustainability, and Impact

At this very early stage of aidóni's organizational growth, the reliance on volunteer work is natural. However, continued reliance on a significant amount of volunteer work in the long-term is not aidóni's objective. Instead, aidóni's leadership wishes to rapidly transition from a volunteer-based organization to an organization that does not rely on free labor and is able to leverage a core of full-time paid employees and short-term contractors, relying on freelance journalists, for example. This transition requires the development of an evolving business model. Even though aidóni is a non-profit, its sustainability will require an entrepreneurial, business-like approach to resources management, aligned with social entrepreneurship (see details). While this is beyond the immediate scope of this

report, it informs the Knowledge Management approach proposed in this document.

Knowledge management can bolster aidóni's growth in fundraising, sustainability, and impact by conceptualizing it within a broader resource mobilization plan. It can help shape a resource mobilization maturity model, lessening the dependency on volunteer labor, broadening the diversity of funding sources, and enhancing the sophistication of systems over time. Knowledge management applied to fundraising strategies and the proposal development/grant application process can strengthen both the effectiveness and efficiency of these efforts, thereby fostering sustainable growth and heightened impact for aidóni.

## Fundraising vs. Resource Mobilization

Fundraising and resource mobilization are both essential aspects of generating support for non-profit organizations, but they differ in scope and approach.

Fundraising refers to the process of soliciting and collecting financial contributions, typically in the form of donations, grants, or sponsorships, to support an organization's programs, projects, or operations. Fundraising efforts often focus on individual donors, foundations, corporations, and government agencies. The primary goal of fundraising is to secure monetary support to help the organization achieve its mission and objectives.

Resource mobilization, on the other hand, encompasses a broader range of activities aimed at securing not only financial resources but also other forms of support, such as in-kind donations, volunteer time, technical expertise, partnerships, and networks. Resource mobilization focuses on the strategic and holistic approach to leveraging various resources to maximize an organization's impact and sustainability. It involves identifying, cultivating, and maintaining relationships with diverse stakeholders, including individuals, private sector entities, government agencies, and other non-profits.

In summary, while fundraising primarily targets financial contributions to support an organization, resource mobilization takes a more comprehensive approach by seeking various forms of support to enhance an organization's capacity, impact, and sustainability.

## 4.1 Integrating Knowledge Management within a Resource Mobilization Maturity Model

A Resource Mobilization Maturity Model for a small non-profit can be defined in three stages, with each stage representing a level of maturity in the organization's capacity to mobilize resources effectively.

Knowledge Management can be integrated into the Resource Mobilization Maturity Model at each stage to enhance the organization's ability to learn, adapt, and improve its resource mobilization efforts. Here's how Knowledge Management can be incorporated into each stage:

Here's a possible breakdown of the stages and integration of Knowledge Management:

### Stage 1: Year 1 - Emerging

At this stage, the non-profit is in its infancy and focuses on establishing the organization's foundation, structures, and basic systems.

- **Identification of resource needs:** Develop a clear understanding of the resources required for the organization's mission and objectives.
- **Initial fundraising efforts:** Begin exploring fundraising options, such as grant applications, crowdfunding, individual donations, and events.
- **Network building:** Establish connections with key stakeholders, including donors, partners, and local communities.
- **Basic donor management:** Implement a simple donor database and communication system to track donations and engage supporters.
- **Simple financial management:** Set up basic financial systems and processes to manage incoming resources and track expenses.

#### Knowledge Management Integration

- **Document processes:** Develop and maintain documentation of resource mobilization processes, systems, and lessons learned.
- **Basic knowledge sharing:** Establish a simple platform or system for sharing fundraising and resource mobilization knowledge among staff and volunteers.
- **Learning from successes and failures:** Encourage open discussions about successes and challenges in resource mobilization to foster a learning culture.

### Stage 2: Year 3 - Developing

At this stage, the non-profit is focused on growth and developing more sophisticated resource mobilization strategies.

- **Diversified funding sources:** Expand fundraising efforts to include a wider range of sources, such as corporate partnerships and major gifts.
- **Strategic planning:** Develop a multi-year strategic plan that outlines the organization's goals and resource needs.
- **Capacity building:** Invest in staff and volunteer training to improve the effectiveness of fundraising and resource management efforts.

- **Donor retention and stewardship:** Implement strategies to cultivate relationships with existing donors and encourage ongoing support.
- **Robust financial management:** Strengthen financial systems and processes, including budgeting, reporting, and auditing.

## Knowledge Management Integration

- **Knowledge repositories:** Create centralized repositories to store and organize information on resource mobilization strategies, donor profiles, and best practices.
- **Cross-functional collaboration:** Facilitate communication and collaboration among different teams and departments to share knowledge and insights about resource mobilization efforts.
- **Training and capacity building:** Develop and implement training programs that incorporate Knowledge Management principles to improve staff and volunteer skills in resource mobilization.
- **Monitoring and evaluation:** Collect and analyze data on resource mobilization performance to identify trends, gaps, and opportunities for improvement.

## Stage 3: Year 5 – Mature

At this stage, the non-profit is established and focuses on long-term sustainability and maximizing resource mobilization efforts.

- **Long-term partnerships:** Develop and maintain long-term relationships with major donors, partners, and stakeholders.
- **Resource planning and forecasting:** Use data-driven strategies to predict and plan for future resource needs.
- **Evaluation and continuous improvement:** Regularly assess the effectiveness of resource mobilization efforts and adapt strategies as needed.
- **Comprehensive donor engagement:** Implement advanced donor management systems and personalized communication strategies to deepen relationships with supporters.
- **Financial sustainability:** Focus on building financial reserves, diversifying revenue streams, and reducing dependency on a single funding source.

## Knowledge Management Integration

- **Organizational learning culture:** Foster a culture of continuous learning and improvement by encouraging staff and volunteers to share knowledge, experiment with new ideas, and learn from experiences.
- **Advanced knowledge sharing platforms:** Implement advanced tools and systems for capturing, storing, and disseminating knowledge related to resource mobilization, such as intranets, wikis, or learning management systems.
- **Communities of practice:** Establish communities of practice or learning networks among staff, volunteers, and partners to facilitate knowledge exchange and collaboration on resource mobilization topics.

- **Knowledge Management strategy:** Develop and implement a comprehensive Knowledge Management strategy that aligns with the organization's resource mobilization objectives and guides efforts to capture, store, and share relevant knowledge.
- **External knowledge sharing:** Engage with other nonprofits, networks, or associations to share best practices, lessons learned, and innovations in resource mobilization, promoting a broader culture of learning within the sector.

Each stage in the Resource Mobilization Maturity Model builds upon the previous one, allowing the organization to grow and become more effective in securing the resources necessary to achieve its mission. The Knowledge Management capabilities grow alongside the organization, supporting organization development.

Integrating Knowledge Management into the Resource Mobilization Maturity Model helps the organization to continuously learn and adapt its strategies, ultimately leading to more effective and sustainable resource mobilization efforts.

## 4.2 Applying Knowledge Management to Fundraising Strategies

**Consider all options:** At this early stage of aidóni's development, the specific resource mobilization that will bring about optimal growth (balanced growth) is perhaps unclear. It is important for aidóni to keep options open and consider the wide breadth of opportunities that may be available. Regardless of the specific options selected for immediate resource mobilization, a fundraising/resource mobilization plan is essential.

**Step 1:** Create a fundraising plan: The aidóni leadership and/or broader resource mobilization team should create and regularly update a fundraising plan that includes identifying potential donors, developing a budget, and setting fundraising goals. The plan should also include strategies for donor engagement and retention. Aidóni's current plan is likely to evolve rapidly.

**Step 2:** Prioritize based on immediate needs, low-hanging fruits, and a well thought-out growth strategy.

**Step 3:** Implement the plan (make sure to adequately document the implementation and pay attention to file management for example).

**Step 4:** Assess results and adjust as needed:

- What's working? What's not working? Tip: Don't focus exclusively on success rates. Pay attention to what's working or not in the process itself. Where are the pain points, the inefficiencies?
- What has changed and needs to be accounted for in the next iteration of the fundraising plan?

### How can Knowledge Management be applied to the fundraising process?

1. **Documentation of knowledge:** Keep track of all the fundraising options in a single document to be revisited at least once a year or when the fundraising plan is being revised.
2. **Organization of knowledge:** Maintain a set of notes for each subcategory of potential funding sources to track ideas, resources, contacts and ensure that all relevant documents are easily accessible.
3. **Learning through reflection:** Maintain a set of lessons learned/feedback notes.

Identifying and prioritizing fundraising options is beyond the scope of this report. However, a list of fundraising options is presented in the appendix. Applying the maturity model to prioritize fundraising efforts for aidóni can help the organization develop a phased approach to increasing funding over time. Here is how the three stages of maturity could guide fundraising priorities:

## Stage 1: Year 1 – Emerging

- **Utilize social media and online fundraising tools:** Begin by leveraging low-cost and accessible fundraising methods, such as social media and online platforms, to reach a wider audience and engage with potential donors.
- **Host small-scale events:** Organize smaller, low-cost fundraising events that can raise awareness for the cause and engage your local community.
- **Research grant opportunities:** Start researching grant opportunities to identify potential funding sources that align with your organization's mission and goals.

## Stage 2: Year 3 – Developing

- **Apply for grants:** Based on your previous research, submit grant proposals to relevant foundations, government agencies, and other organizations that support your mission.
- **Scale up events:** Organize larger and more sophisticated fundraising events, using the experience and connections gained from the initial smaller events.
- **Develop a major gifts program:** Begin to cultivate relationships with high-level donors who have the capacity to make significant contributions to the organization.
- **Explore sponsorships:** Seek sponsorships from local businesses or corporations that share your organization's mission and values.

## Stage 3: Year 5 – Mature

- **Expand grant applications:** Continue to apply for a broader range of grants, leveraging your organization's track record and increased capacity for project implementation.
- **Strengthen major gifts program:** Continue to grow and refine your major gifts program, focusing on cultivating long-term relationships with high-level donors.
- **Optimize fundraising events:** Evaluate the effectiveness of your fundraising events and optimize them based on the lessons learned, focusing on those that generate the most significant impact and return on investment.
- **Diversify sponsorships:** Seek sponsorships from a wider range of businesses and corporations, demonstrating the organization's growth and impact in independent journalism and conflict reporting.

By applying the maturity model to prioritize fundraising efforts, you can systematically increase your organization's funding over time, ensuring that your fundraising strategies evolve in tandem with the growth and development of your non-profit. This approach allows you to start with more accessible

fundraising methods and gradually expand to more sophisticated and high-impact strategies as your organization matures while allowing the Knowledge Management to evolve alongside and support all organizational objectives.

## 4.3 Applying Knowledge Management to the Proposal Development and/or Grant Application Process

### Mapping the process

Mapping the process for developing a proposal or grant application is the first step in optimizing resources available, including knowledge and time. A generic process can apply for both proposals and grants, with some differentiation as needed. This process map will also become valuable when more individuals are brought into the process of supporting fundraising via proposal writing and grants application writing.

A general process is outlined in the appendix, highlighting how Knowledge Management components can provide support. The process can be customized to meet aidóni's immediate needs by simplifying it but it can also serve as a framework in the longer-term to build knowledge resources around various elements of the process. It can also be used to help delegate specific tasks while maintaining a common understanding of the complete process. It gives anyone working on a smaller, specific task within the process, a broad idea of how they are contributing to the bigger process and common understanding.

Knowledge Management can support four specific aspects of the proposal development and/or grants application process:

#### 1. Organize research into possible funding sources

Avoid reinventing the wheel and wasting time by establishing efficient processes for researching potential funding sources and keeping track of research, with the understanding that information changes and needs to be verified, revalidated, etc...

#### 2. Develop job aids to provide just-in-time process support

- Organize your support files so that they are easily accessible in the workflow, in the process of working on the proposal. For example, a template proposal document could include links to your support materials for easy reminders. Of course, these links need to be removed prior to submission.
- Review your support materials on an annual basis at a minimum to ensure that the guidance remains fresh.

#### 3. Document work outputs

- Organize your proposal submissions so you can easily find them and potentially reuse sections.
- Organize your feedback files so that you can easily aggregate feedback, analyze results of your efforts.

#### 4. Identify opportunities for capturing proposal/grant knowledge for reuse

- Develop storage/archiving processes and systems to easily retrieve/reuse proposals/grant applications.
- Develop a donor directory.
- Develop a debrief process to document lessons from the proposal development/grant application process and integrate lessons immediately in fundraising efforts.

### How will this “scale” as the organization grows? How does it fit within the resource mobilization maturity model?

- Different types of funding might be sought, requiring the acquisition of new capabilities in terms of funding applications processes;
- This may in turn increase the complexity of the processes involved and range of lessons to be captured and shared.

The rather sophisticated process presented in the appendix can be a little overwhelming for a small team to manage, but applying the maturity model can help adjust to the right level of capabilities while considering future growth in capabilities and sophistication. You can apply the maturity model to the proposal development and grant application process by creating three stages of maturity that reflect the growth and sophistication of the organization's fundraising efforts.

## Here's a possible breakdown of the three stages:

- Different types of funding might be sought, requiring the acquisition of new capabilities in terms of funding applications processes;
- This may in turn increase the complexity of the processes involved and range of lessons to be captured and shared.

The rather sophisticated process presented in the appendix can be a little overwhelming for a small team to manage, but applying the maturity model can help adjust to the right level of capabilities while considering future growth in capabilities and sophistication. You can apply the maturity model to the proposal development and grant application process by creating three stages of maturity that reflect the growth and sophistication of the organization's fundraising efforts.

Here's a possible breakdown of the three stages:

### Stage 1: Year 1 – Emerging

- **Basic research and identification of opportunities:** Conduct initial funding source research and maintain a simple record of findings.
- **Ad-hoc grant writing team:** Assemble a team of staff and volunteers with relevant skills for each grant application.
- **Basic proposal templates:** Use simple, generic proposal templates to create a consistent structure for grant applications.
- **Limited internal review:** Conduct informal reviews of proposals by peers or supervisors.
- **Basic submission and follow-up:** Submit proposals and track application status using a manual, spreadsheet-based system.

[ Once you have achieved these, consider applying some of the elements detailed in Stage 2. ]

### Stage 2: Year 3 – Developing

- **Systematic research and tracking of opportunities:** Establish a more organized system for researching and tracking funding opportunities, including a database of potential sources.
- **Dedicated grant writing team:** Create a dedicated team with specific roles and responsibilities for proposal development and grant writing.
- **Customizable proposal templates:** Develop a library of customizable proposal templates tailored to different types of funding opportunities.
- **Standardized internal review process:** Implement a standardized review process with specific criteria and a formal feedback mechanism.
- **Integrated submission and follow-up system:** Use a CRM or grant management system to streamline the submission, tracking, and reporting process.

### Stage 3: Year 5 – Mature

- **Proactive funding opportunity identification:** Develop a proactive approach to identifying funding opportunities by monitoring trends, engaging with funders, and building strategic partnerships.
- **Skilled and specialized grant writing team:** Build a team of skilled and specialized grant writers, with ongoing professional development opportunities to enhance their expertise.
- **Advanced proposal templates and guidelines:** Develop advanced proposal templates, guidelines, and best practices, incorporating learnings from previous applications and funder feedback.
- **Comprehensive internal review and approval:** Implement a comprehensive internal review process, including multiple levels of review and quality control checks.
- **Automated submission and monitoring system:** Utilize advanced grant management software to automate submission, tracking, reporting, and follow-up processes.

By applying the maturity model to the proposal development and grant application process, the organization can progressively improve its grant-seeking capabilities and increase the likelihood of securing funding to support its mission and objectives.

# 5. Strengthening Organizational Strategy and Work Planning with Knowledge Management

Knowledge Management is most impactful when it is strategically embedded in the flow of work rather than a separate activity. One approach to embedding Knowledge Management is to integrate it within an Operations Manual so that it becomes part of how work is done. The Operations Manual must evolve as the organization grows and the formats used to make it accessible and usable might evolve as well,

in alignment with the technology available. In turn, the technology available will align to a Technology Roadmap that follows a similar maturity model, increasing in sophistication as the organization's capabilities and resources increase. That growth will also be supported and enhanced by leveraging organizational learning within the Knowledge Management approach.

## 5.1 Embedding KM in an Operations Manual

One way to embed Knowledge Management throughout the organization's DNA is to integrate it within the organization's Operations Manual. Embedding Knowledge Management in the operations manual for a small non-profit organization like aidóni involves integrating processes, best practices, and tools that facilitate the creation, sharing, and utilization of knowledge.

### Here are some recommendations to achieve this:

- **Begin with a clear definition:** Clearly define what Knowledge Management means for your organization, including its goals, objectives, and scope, within the manual.
- **Identify key knowledge areas:** Outline the critical knowledge areas and resources relevant to your organization, such as program design, fundraising strategies, stakeholder management, and compliance requirements.
- **Document processes and best practices:** Include detailed descriptions of processes, best practices, and lessons learned across different functions and projects. Regularly update this information to reflect evolving needs and insights.
- **Standardize procedures:** Establish standardized procedures for capturing, storing, and sharing knowledge, such as documenting project learnings, conducting after-action reviews, or creating knowledge repositories.
- **Assign roles and responsibilities:** Clearly outline the roles and responsibilities of team members in relation to Knowledge Management, including who is responsible for creating, updating, and sharing information.
- **Promote a culture of learning:** Encourage continuous learning and improvement by providing guidelines on conducting regular training, workshops, and knowledge-sharing sessions among team members.
- **Establish collaboration and communication channels:** Recommend tools and platforms for collaboration and communication, such as shared document repositories, instant messaging apps, or project management systems.
- **Measure and evaluate:** Define metrics and indicators to measure the effectiveness of your Knowledge Management efforts, and outline a process for regular evaluation and improvement.

- **Train and support:** Provide guidelines on training and onboarding new team members to ensure they understand the importance of Knowledge Management and can effectively utilize the operations manual and other knowledge resources.
- **Emphasize data protection and security:** Outline best practices and policies related to data protection, privacy, and security, ensuring that sensitive information is handled responsibly and in compliance with relevant regulations.

By incorporating these recommendations, you can effectively embed Knowledge Management within your operations manual, fostering a culture of learning, collaboration, and continuous improvement within your small non-profit organization.

This may seem a little overwhelming but remember

to consider the maturity model. It is not necessary to immediately establish a highly sophisticated framework. Consider what is essential for an initial Operations Manual to cover and plan on continuous improvement and increased sophistication as the need arises and capabilities increase along the maturity model.

## 5.2 Role of an Operations Manual

The purpose of an operations manual for a nonprofit organization is to provide a comprehensive guide on the organization's policies, procedures, guidelines, and best practices, ensuring that all employees and volunteers are aligned with its mission and objectives. The manual helps maintain consistency,

efficiency, and compliance in the organization's daily operations, decision-making, and service delivery. It also serves as a valuable resource for training and onboarding new team members, as well as a reference for existing employees.

### The Operations Manual is intrinsically connected to Knowledge Management in a non-profit organization through the following aspects:

- **Centralized Repository:** The manual acts as a centralized repository of essential organizational knowledge, capturing the collective wisdom, experiences, and lessons learned over time. This enables employees and volunteers to access and utilize this knowledge in their daily work, improving the overall effectiveness of the organization.
- **Standardization and Consistency:** By outlining standardized processes and procedures, the operations manual ensures consistency across the organization. This promotes the efficient sharing and use of knowledge, minimizing the risk of miscommunication, duplicated efforts, or loss of critical information.
- **Knowledge Transfer:** The manual facilitates knowledge transfer among employees and volunteers by providing a common reference point for best practices, guidelines, and protocols. This helps preserve institutional knowledge, especially when there is staff turnover or when new members join the organization.
- **Continuous Learning and Improvement:** The operations manual supports a culture of continuous learning and improvement by encouraging the regular review, evaluation, and updating of policies and procedures. This enables the organization to adapt and respond to evolving needs and challenges, incorporating new insights and knowledge gained from experience.
- **Collaboration and Communication:** By providing a shared understanding of the organization's policies and procedures, the manual fosters collaboration and communication among team members. This promotes knowledge sharing, cross-functional cooperation, and coordinated efforts towards achieving the non-profit's goals.
- **Collaboration and Communication:** By providing a shared understanding of the organization's policies and procedures, the manual fosters collaboration and communication among team members. This promotes knowledge sharing, cross-functional cooperation, and coordinated efforts towards achieving the non-profit's goals.

In summary, an operations manual plays a crucial role in a non-profit's Knowledge Management efforts by serving as a centralized source of essential information, promoting standardization and consistency, facilitating knowledge transfer, supporting continuous learning and improvement, and encouraging collaboration and communication within the organization.

Operations Manuals can come in many different forms (see options in the appendix). Applying the maturity model helps to inject some realistic expectations in terms of sophistication and consider the fact that aidóni is operating as a fully virtual workplace.

## Stage 1: Year 1 – Emerging

- **Digital copies:** Start with basic digital versions of the operations manual (e.g., PDF or Word documents) shared through email or simple cloud storage services.
- **Ad-hoc training:** Conduct occasional virtual training sessions or workshops to review the operations manual and ensure employee understanding.

## Stage 2: Year 3 – Developing

- **Collaborative platforms:** Adopt collaborative platforms like Google Workspace or Microsoft Teams to facilitate access and collaboration on the operations manual.
- **Multimedia enhancements:** Begin to explore multimedia enhancements for the manual using basic tools like Canva or PowerPoint.
- **Regular virtual training and workshops:** Increase the frequency of virtual training sessions and workshops to review the operations manual and gather employee feedback.

## Stage 3: Year 5 – Mature

- **Advanced intranet or Knowledge Management system:** Implement a comprehensive intranet or Knowledge Management system to host the operations manual and facilitate collaboration and knowledge sharing in the virtual environment.
- **Mobile app:** Develop a mobile app to make the operations manual more accessible to employees on their smartphones or tablets.
- **Interactive multimedia:** Transform the operations manual into an engaging, interactive multimedia experience using advanced tools like Genially or Prezi.
- **Video or audio format:** Convert key sections of the operations manual into video or audio format for increased accessibility and engagement.
- **Continuous improvement and updates:** Establish a regular review and update process for the operations manual, incorporating employee feedback and organizational changes in the virtual context.

By applying the maturity model to the formats of the operations manual in a fully virtual office, aidóni can progressively enhance the accessibility, engagement, and effectiveness of the manual as a vital resource for remote employees. This growth aligns with the organization's overall development and capacity

to adopt new technologies and best practices in Knowledge Management and remote work.

The discussion for formats for the Operations Manual leads us to a discussion of technologies and a technology roadmap.

## 5.3 Technology Roadmap Outline

A technology roadmap for a fully virtual small non-profit organization with limited resources like aidóni should focus on cost-effective, user-friendly, and scalable solutions that facilitate remote work, streamline operations, and support the organization's goals. See the appendix for an outline of a suggested technology roadmap.

The technology roadmap must be aligned with the Resource Mobilization Maturity Model by identifying and implementing technological solutions that support and enhance the organization's resource mobilization efforts at each stage of maturity.

Here is how the technology roadmap might be aligned with each stage:

### Stage 1: Year 1 – Emerging

- **Basic donor database:** Implement a simple CRM or donor management system to track donor information and communication history.
- **Social media and online presence:** Establish a website and social media accounts to increase visibility, promote the organization's mission, and engage supporters.
- **Online fundraising tools:** Utilize basic online fundraising platforms and tools, such as crowdfunding websites and online donation forms.
- **Basic financial management software:** Implement simple financial management software to track income and expenses.

### Stage 2: Year 3 – Developing

- **Advanced CRM system:** Upgrade to a more advanced CRM system that allows for better segmentation, donor profiling, and communication tracking.
- **Email marketing and automation tools:** Implement email marketing tools to engage and communicate with supporters more effectively.
- **Analytics and reporting:** Utilize analytics tools to track resource mobilization performance, identify trends, and inform decision-making.
- **Project management and collaboration tools:** Adopt project management and collaboration tools to support cross-functional teamwork and communication in resource mobilization efforts.
- **Robust financial management software:** Upgrade to more comprehensive financial management software to support budgeting, reporting, and auditing functions.

### Stage 3: Year 5 – Mature

- **Integrated resource mobilization platform:** Implement a fully integrated platform that streamlines resource mobilization processes, such as donor management, fundraising campaigns, and event planning.
- **Advanced data analytics and visualization tools:** Leverage advanced data analytics tools to support predictive resource planning and strategic decision-making.
- **Knowledge Management systems:** Adopt advanced Knowledge Management systems, such as intranets, wikis, or learning management systems, to facilitate knowledge sharing and collaboration.
- **Donor engagement technologies:** Utilize technologies that support personalized donor engagement, such as marketing automation, AI-driven communication tools, and virtual events.
- **Cybersecurity and data privacy:** Implement robust cybersecurity measures and data privacy policies to protect sensitive donor and organizational information.

By aligning the technology roadmap with the Resource Mobilization Maturity Model, the organization can leverage technology to support and enhance its resource mobilization efforts, improving efficiency and effectiveness throughout each stage of maturity.

## 5.4 Measuring Effectiveness, Operational Efficiency, and Broader Impact

Measuring the effectiveness, operational efficiency, and broader impact of aidóni is crucial for understanding your progress and making informed decisions. Applying the maturity model to this process can help guide your organization through different stages of development. Here's how the three stages of maturity could shape your approach to measurement and organizational learning (OL).

Integrating Knowledge Management practices into your efforts to measure effectiveness, efficiency, and impact can help your organization effectively capture, organize, and share relevant information, leading to better decision-making and continuous improvement. Here's how you can integrate Knowledge Management into your measurement efforts across the three stages of maturity:

### Stage 1: Year 1 – Emerging

- **Define key performance indicators (KPIs):** Identify the most relevant KPIs to track your organization's effectiveness and efficiency, such as fundraising success, the number of articles published, and website traffic.
- **Establish baseline data:** Collect baseline data for your chosen KPIs to understand your starting point and set realistic goals for improvement.
- **Monitor operational efficiency:** Track basic operational metrics, such as budget utilization, staff productivity, and volunteer engagement, to ensure that resources are being used efficiently.
- **Collect qualitative feedback:** Gather qualitative feedback from staff, volunteers, and stakeholders to better understand the organization's initial impact and areas for improvement.
- **Document KPIs and baseline data:** Record your chosen KPIs and baseline data in a central, accessible location, such as a shared document management system, to ensure that all staff and volunteers have access to this critical information.
- **Encourage knowledge sharing:** Foster a culture of knowledge sharing by encouraging staff and volunteers to share their insights, experiences, and lessons learned related to the organization's effectiveness, efficiency, and impact.
- **Create templates and guidelines:** Develop templates and guidelines for collecting and reporting data, which can help standardize your organization's measurement processes and facilitate knowledge sharing.

### Stage 2: Year 3 – Developing

- **Refine KPIs and set targets:** Review and refine your KPIs based on your organization's growth and changing priorities. Set specific, measurable targets for each KPI to guide your progress.
- **Implement monitoring and evaluation systems:** Establish systematic monitoring and evaluation processes to track your organization's effectiveness and efficiency against your KPIs and targets.
- **Evaluate broader impact:** Begin to assess the broader impact of your organization's work, such as changes in public awareness, policy influence, or support for change agents in conflict contexts.
- **Conduct regular reviews:** Hold regular reviews to discuss your organization's progress against its KPIs and targets, and make data-driven decisions to adjust strategies and plans as needed.
- **Centralize monitoring and evaluation data:** Implement a central repository or platform for storing and organizing data from your monitoring and evaluation systems, making it easily accessible to staff and volunteers.
- **Develop a Knowledge Management strategy:** Create a Knowledge Management strategy that includes goals and objectives related to measuring effectiveness, efficiency, and impact, ensuring that your Knowledge Management efforts support your measurement activities.
- **Provide training and resources:** Offer training and resources for staff and volunteers on Knowledge Management practices related to measurement, such as data collection, analysis, and reporting.

## Stage 3: Year 5 – Mature

- **Optimize measurement systems:** Continuously refine your monitoring and evaluation systems to ensure they remain relevant, efficient, and effective in measuring your organization's progress and impact.
- **Conduct comprehensive impact assessments:** Undertake more in-depth impact assessments, such as longitudinal studies or external evaluations, to gain a deeper understanding of your organization's long-term influence and effectiveness.
- **Foster a culture of data-driven decision-making:** Encourage staff and volunteers to use data and insights from your measurement systems to inform their work and drive continuous improvement.
- **Share learnings and best practices:** Communicate your organization's successes, challenges, and lessons learned to stakeholders, donors, and partners to demonstrate your impact and contribute to the broader field of independent journalism and conflict reporting.
- **Implement lessons learned and best practices:** Establish a process for capturing and sharing lessons learned and best practices from your measurement activities, which can inform future decision-making and improve your organization's effectiveness and impact.
- **Encourage cross-functional collaboration:** Promote cross-functional collaboration in the measurement process by organizing workshops, meetings, or other activities that bring together staff and volunteers from different departments to discuss and learn from the organization's progress and impact.
- **Continuously improve Knowledge Management systems:** Regularly review and update your Knowledge Management systems and practices to ensure they remain effective and relevant in supporting your organization's efforts to measure effectiveness, efficiency, and impact.

By integrating Knowledge Management practices into your measurement efforts, you can help aidóni effectively capture, organize, and share relevant information, leading to better decision-making, continuous improvement, and a greater understanding of your organization's effectiveness, efficiency, and impact.

Here is an illustrative example of how KPIs could evolve alongside the maturity model. The KPIs need to be adjusted to provide a better fit with aidóni's objectives and specific Theory of Change.

## Stage 1: Year 1 – Emerging

### Fundraising and financial KPIs:

- Total funds raised
- Number of new donors
- Average donation amount

### Operational efficiency KPIs:

- Budget utilization rate
- Ratio of program expenses to total expenses

### Impact and influence KPIs:

- Number of citations or references to your work by other media outlets or organizations
- Change in public awareness or sentiment on conflict-related issues

### Content production and outreach KPIs:

- Number of articles published
- Total website traffic
- Social media engagement (likes, shares, comments)

### Internal capacity KPIs:

- Number of staff and freelance journalists trained or onboarded
- Adoption rate of Knowledge Management tools and platforms

## Stage 2: Year 3 – Developing

### Fundraising and financial KPIs:

- Grant success rate
- Percentage of funding from diversified sources

### Impact and influence KPIs:

- Number of policy changes or advocacy successes influenced by your reporting
- Number of journalists or change agents trained or supported by your organization

### Internal capacity and Knowledge Management KPIs:

- Frequency of knowledge sharing and collaboration among staff and freelance journalists
- Quality and relevance of knowledge assets (e.g., reports, templates, guidelines)

### Content production and outreach KPIs:

- Number of investigative reports produced
- Email newsletter open and click-through rates

### Operational efficiency KPIs:

- Staff and freelance journalist retention rates
- Time spent on administrative tasks vs. core activities

## Stage 3: Year 5 – Mature

### Fundraising and financial KPIs:

- Long-term financial stability (e.g., reserve funds, endowment)

### Impact and influence KPIs:

- Collaboration with other organizations or networks working on similar issues
- Long-term impact on conflict resolution and peacebuilding

### Internal capacity and Knowledge Management KPIs:

- Continuous improvement and adaptation of Knowledge Management practices
- Staff and freelance journalist satisfaction with Knowledge Management systems and support

### Content production and outreach KPIs:

- Expansion of content formats (e.g., multimedia, data visualization, podcasts)

### Operational efficiency KPIs:

- Streamlined administrative processes
- Cost-effectiveness of program delivery

Remember to tailor the KPIs to aidóni's specific goals and objectives, and review and adjust them as needed to ensure they remain relevant and effective in measuring aidóni's progress.

## 5.5 Beyond Metrics – Capturing Lessons Learned

Capturing lessons learned is essential for continuous improvement and growth at each stage of maturity. Here are some ways aidóni can improve its efforts to capture lessons learned at each stage:

### Stage 1: Year 1 – Emerging

- **Develop a simple, structured process:** Introduce a basic process for documenting and sharing lessons learned. Encourage staff and freelance journalists to record their observations, insights, and challenges faced during their work.
- **Regular team meetings:** Hold regular team meetings where staff and freelance journalists can share their experiences, discuss challenges, and exchange ideas for improvement.
- **Centralized documentation:** Create a centralized repository (e.g., Google Drive, intranet) where lessons learned documents can be stored, organized, and easily accessed by everyone.

### Stage 2: Year 3 – Developing

- **Expand and formalize the process:** As the organization matures, establish a more formal process for capturing and analyzing lessons learned. This may include a standardized template or form to ensure consistency across the organization.
- **Cross-functional learning:** Encourage cross-functional collaboration and knowledge sharing by organizing workshops, seminars, or training sessions that bring together staff and freelance journalists from different areas of the organization.
- **Review and integrate lessons learned:** Regularly review the collected lessons learned and integrate them into the organization's processes, policies, and training materials to drive continuous improvement.

### Stage 3: Year 5 – Mature

- **Continuous improvement culture:** Foster a culture of continuous improvement, where learning from successes and failures is valued and encouraged. Recognize and reward staff and freelance journalists who contribute to capturing and sharing lessons learned.
- **Advanced Knowledge Management systems:** Implement advanced Knowledge Management systems that can help automate the capture, organization, and dissemination of lessons learned across the organization.
- **Monitor and evaluate impact:** Monitor and evaluate the impact of incorporating lessons learned into the organization's practices. This may involve tracking relevant KPIs or conducting periodic assessments to gauge the effectiveness of improvements.
- **External sharing and learning:** Engage with external partners, networks, and peer organizations to share lessons learned and gain insights from their experiences. This can help the organization to learn from a broader range of perspectives and drive further improvements.

By focusing on these strategies at each stage of maturity, the organization can ensure that it effectively captures and leverages lessons learned to drive continuous improvement and growth.

## 5.6 Simple guidance for documenting lessons learned at the emerging stage of maturity



**Tip:** The primary reason lessons learned are not captured is time and the fact that the process is not fully embedded in existing organizational routines. To ensure that lessons learned sessions are conducted on a regular basis, include “lessons learned” as a regular agenda item in organizational meetings and take the time to plan for specific discussions.

- **Define the purpose:** Clearly explain the purpose of documenting lessons learned to your team. Emphasize the importance of continuous improvement and learning from experiences to enhance the organization’s work.
- **Establish a format:** Develop a simple, structured template for recording lessons learned. This template can include sections such as:
  - Project or activity name
  - Date
  - Team members involved
  - Description of the experience or challenge
  - Key lessons learned
  - Recommendations for improvement or future actions
- **Encourage open communication:** Foster an environment where staff and freelance journalists feel comfortable discussing both successes and challenges openly. This will help ensure that lessons learned are genuinely reflective of experiences.
- **Assign responsibility:** Designate a person or team responsible for overseeing the process of documenting lessons learned. This can help ensure that lessons learned are consistently captured and managed.
- **Set regular intervals:** Schedule regular intervals (e.g., monthly or quarterly) for team members to document and share their lessons learned. This helps establish a routine and keeps the practice top of mind.
- **Centralize storage:** Create a centralized repository (e.g., Google Drive, intranet) where all lessons learned documents can be stored, organized, and easily accessed by team members.
- **Review and discuss:** Hold regular team meetings or workshops to discuss and review the lessons learned. Use these opportunities to identify common themes, areas for improvement, and best practices that can be applied across the organization.
- **Act on the lessons learned:** Ensure that the insights gained from lessons learned are incorporated into the organization’s processes, policies, and training materials. This will help drive continuous improvement and growth.
- **Monitor progress:** Keep track of the improvements made based on the lessons learned, and periodically evaluate their effectiveness in enhancing the organization’s work.

By following these simple steps, aidóni can begin to effectively document and apply lessons learned even at the emerging stage of maturity.

# 6. Appendices

## Appendix A. Knowledge Management Resources

### A1. Knowledge Management Framework

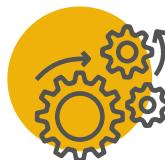
While we argue throughout this report that Knowledge Management should be embedded throughout an organization's operations, it is useful to also have an idea of how the elements of Knowledge Management embedded throughout fit together in a coherent framework. The key elements or pillars of the KM framework are: People, Process, Technology, and Governance. These four elements are detailed below and later run through the maturity model we have been applying throughout this report.

#### General Framework



##### People: Roles, Skills and Competencies

- Foster a culture of knowledge sharing and collaboration among staff and volunteers.
- Provide training and resources for staff and volunteers to develop their knowledge and skills.
- Encourage staff and volunteers to contribute their expertise and insights to the organization's knowledge base.
- Establish a dedicated Knowledge Management team or assign responsibilities for Knowledge Management to existing roles.



##### Process: Workflow, Collaboration and Decision Making

- Develop a Knowledge Management strategy that outlines goals, objectives, and key performance indicators. This is critical to ensure that your Knowledge Management efforts are targeted, strategic, and fully aligned with your specific organizational needs. For example at this stage of aidóni's development Knowledge Management focused on fundraising may be a priority.
- Create clear and consistent processes for capturing, organizing, and sharing knowledge.
- Implement a system for regular knowledge audits to identify gaps and redundancies.
- Encourage cross-functional collaboration and knowledge sharing through meetings, workshops, or other activities.
- Establish a process for continuous improvement and adaptation of Knowledge Management practices.



##### Technology: Tools, Systems and Platforms

- Select appropriate technology tools and platforms that support Knowledge Management, such as document management systems, intranets, and collaboration tools (e.g., Google Workspace).
- Ensure that technology tools are user-friendly and accessible to all staff and volunteers.
- Train staff and volunteers on the proper use of technology tools for Knowledge Management.
- Implement data security and privacy measures to protect sensitive information.



## Governance: Policies, Standards, and Compliance

- Develop policies and guidelines for Knowledge Management, such as document naming conventions, file organization, and access permissions.
- Assign responsibility for Knowledge Management oversight to a specific person or team within the organization. For a small organization, this may be within the purview of the person responsible for operations management.
- Regularly review and update Knowledge Management policies and procedures to ensure they remain effective and relevant.
- Monitor and evaluate the effectiveness of Knowledge Management practices and make necessary adjustments.

## KM Framework with Maturity Model

Let's apply the maturity model to the Knowledge Management Framework:

Aligning the Knowledge Management framework with the maturity model involves identifying the key aspects of each component (People, Process, Technology, and Governance) at each stage of the maturity model. Here's a possible breakdown:

### Stage 1: Year 1 – Emerging

#### People:

- Encourage informal knowledge sharing and collaboration among staff and volunteers.
- Provide basic training resources for staff and volunteers to develop their knowledge and skills.
- Assign Knowledge Management responsibilities to existing roles.

#### Process:

- Establish basic processes for capturing, organizing, and sharing knowledge.
- Conduct ad-hoc knowledge audits to identify gaps and redundancies.
- Foster cross-functional collaboration and knowledge sharing through informal meetings or workshops.

#### Technology:

- Use simple, accessible technology tools and platforms for Knowledge Management, such as cloud storage services and shared documents.
- Provide basic training on the use of technology tools for Knowledge Management.

#### Governance:

- Develop informal guidelines for Knowledge Management practices. [We have provided suggestions for integrating KM within the Operations Manual and ways to integrate KM in fundraising]
- Assign responsibility for Knowledge Management oversight to a specific person or team on an ad-hoc basis.
- Periodically review and update Knowledge Management practices based on feedback and experience.

### Stage 2: Year 3 – Developing

#### People:

- Foster a more structured culture of knowledge sharing and collaboration among staff and volunteers.
- Implement a comprehensive training program to develop staff and volunteer knowledge and skills.
- Create a dedicated Knowledge Management team or formally assign responsibilities to existing roles.

**Process:**

- Develop a Knowledge Management strategy with clear goals, objectives, and key performance indicators.
- Establish consistent processes for capturing, organizing, and sharing knowledge.
- Implement a system for regular knowledge audits and continuous improvement of Knowledge Management practices.

**Technology: (aligned with the technology roadmap and associated maturity model)**

- Adopt more advanced technology tools and platforms for Knowledge Management, such as intranets and collaboration tools (e.g., Google Workspace).
- Ensure technology tools are user-friendly and accessible to all staff and volunteers.
- Implement basic data security and privacy measures.

**Governance:**

- Develop formal policies and guidelines for Knowledge Management, including document naming conventions, file organization, and access permissions.
- Regularly review and update Knowledge Management policies and procedures.
- Monitor and evaluate the effectiveness of Knowledge Management practices and make necessary adjustments.

## Stage 3: Year 5 – Mature

**People:**

- Continuously promote a culture of knowledge sharing and collaboration across the organization.
- Implement advanced training and professional development opportunities for staff and volunteers.
- Establish a highly skilled and specialized Knowledge Management team with well-defined roles and responsibilities.

**Process:**

- Continuously refine and adapt the Knowledge Management strategy to align with organizational needs and industry best practices.
- Optimize Knowledge Management processes to maximize efficiency and effectiveness.
- Institutionalize cross-functional collaboration and knowledge sharing through formal activities and platforms.

**Technology: (aligned with the technology roadmap and associated maturity model)**

- Utilize advanced technology tools and platforms that support Knowledge Management, such as comprehensive document management systems and Knowledge Management software.
- Train staff and volunteers on the proper use of advanced technology tools for Knowledge Management.
- Implement robust data security and privacy measures to protect sensitive information.

**Governance:**

- Develop comprehensive policies and standards for Knowledge Management that encompass all aspects of the organization's operations.
- Assign responsibility for Knowledge Management oversight to a specific person or team with a well-defined mandate and authority.
- Continuously monitor, evaluate, and improve Knowledge Management policies, procedures, and practices to ensure ongoing effectiveness and relevance.

By aligning the Knowledge Management framework with the maturity model, aidóni can systematically enhance its Knowledge Management capabilities and ensure that its practices evolve in tandem with the organization's overall growth and development.

## A2. Knowledge Management Resources for Nonprofits

There are several Knowledge Management websites and resources that can be helpful for non-profit organizations. These websites often provide articles, case studies, tools, and best practices that can be adapted and applied to non-profit settings. Here are some relevant websites:

### Nonprofit Knowledge Management Hub (KM4Dev):

A knowledge-sharing platform for non-profit professionals to exchange ideas and resources related to Knowledge Management. KM4Dev provides resources, discussions, and networking opportunities for its members.

Website: <http://www.km4dev.org/>

### Nonprofit Technology Network (NTEN):

NTEN is a community of non-profit professionals who are interested in leveraging technology for social change. They offer resources, articles, webinars, and conferences related to technology, including Knowledge Management.

Website: <https://www.nten.org/>

### TechSoup:

TechSoup is a global non-profit that provides technology resources, support, and tools for nonprofits. They offer a range of resources on Knowledge Management, including articles, webinars, and online courses.

Website: <https://www.techsoup.org/>

### Idealware:

Idealware is a non-profit that provides resources and guidance to help non-profits make smart decisions about technology. They have articles, reports, and webinars on various technology topics, including Knowledge Management.

Website: <https://www.idealware.org/>

### Knowledge for Development Partnership (K4DP):

K4DP is a global partnership dedicated to promoting knowledge sharing and collaboration for sustainable development. Their website features articles, case studies, and resources related to Knowledge Management in the development sector.

Website: <https://www.k4dp.org/>

### APQC (American Productivity & Quality Center):

APQC is a non-profit organization focused on benchmarking, best practices, and process improvement. They offer a range of Knowledge Management resources, including articles, webinars, and case studies that can be relevant for non-profit organizations.

Website: <https://www.apqc.org/>

While these websites are not exclusively focused on nonprofits, they provide valuable insights and resources related to Knowledge Management that can be adapted for the non-profit sector.

The following are broader KM resources:

### Knowledge Management World (KMWorld):

KMWorld is an online resource that provides articles, webinars, and research related to Knowledge Management. Their content is geared towards a variety of organizations, including startups.

Website: <https://www.kmworld.com/>

### Knowledge Management Tools (KM-Tools):

This website provides a comprehensive list of Knowledge Management tools, techniques, and resources that can be useful for startups looking to implement Knowledge Management practices.

Website: <https://www.knowledge-management-tools.net/>

### Knowledge Management Institute (KMI):

KMI is an international organization that offers Knowledge Management training, certification, and resources. Their website features articles, webinars, and best practices that can be helpful for startups.

Website: <https://www.kminstitute.org/>

### LinkedIn Groups:

There are several LinkedIn groups dedicated to Knowledge Management where professionals share resources, insights, and best practices. Joining these groups can help startups access valuable Knowledge Management content and network with other professionals.

### SIKM Leaders Community:

SIKM is a global community of Knowledge Management professionals who share resources, insights, and best practices. Their website and discussion forums can provide valuable information for startups looking to implement Knowledge Management practices.

Website: <https://sikm.groups.io/g/main>

## A3. Nonprofit Support in Europe

There are several resources available for non-profit guidance in Europe. These organizations and websites provide resources, support, and advice on various aspects of non-profit management, fundraising, and capacity building. Here are some of the top resources:

**Philanthropy Europe:** Philanthropy Europe is a network of European foundations and philanthropic organizations that work together to promote strategic philanthropy. The association was formed in 2011 as a partnership between the European Foundation Centre (EFC) and the Donors and Foundations Networks in Europe (DAFNE). Philanthropy Europe aims to strengthen the impact of philanthropy by sharing knowledge, promoting collaboration, and advocating for the needs of philanthropy in Europe. The association provides a platform for its members to exchange best practices, launch joint initiatives, and engage in dialogue with policymakers, civil society, and other stakeholders. The network includes more than 30 member organizations from across Europe, representing a diverse range of philanthropic activities and priorities.

Website: <https://philea.eu/>

**EUCLID Network:** EUCLID Network is a European network of civil society organizations and social enterprises, focused on capacity building, networking, and policy advocacy. They offer resources, events, and networking opportunities for non-profit organizations in Europe.

Website: <https://euclidnetwork.eu/>

### Nonprofit Tech for Good (European-focused resources):

Nonprofit Tech for Good is a global resource site that covers technology news, trends, and best practices for the non-profit sector.

Website: <https://www.nptechforgood.com/>

**Transnational Giving Europe (TGE):** TGE is a network of European foundations and associations that facilitates cross-border giving within Europe. They provide resources and support for non-profit organizations seeking to raise funds from donors in other European countries.

Website: <https://www.transnationalgiving.eu/>

### European Venture Philanthropy Association (EVPA):

EVPA is a network of European social investors, grant-makers, and venture philanthropists. They offer resources, events, and networking opportunities for non-profit organizations and social enterprises in Europe.

Website: <https://www.evpa.ngo>

### CAF Global Alliance:

The CAF Global Alliance is a network of independent organizations that support non-profit organizations and philanthropy worldwide. CAF has a presence in several European countries and provides resources, research, and support for non-profit organizations.

Website: <https://www.cafonline.org/international-giving>

These resources provide valuable support and guidance for non-profit organizations operating in Europe. They can help with capacity building, networking, fundraising, and understanding the unique challenges and opportunities in the European non-profit sector.

## A4. Maturity Models

There are several websites that provide resources related to maturity models for non-profit organizations. These websites often offer frameworks, tools, and best practices that can be helpful for non-profits at various stages of growth and development. Here are some relevant websites:

**Bridgespan Group:** Bridgespan is a non-profit consulting firm that provides management advice, tools, and resources for non-profit organizations. They offer resources on capacity building and organizational development, which may include maturity models.

Website: <https://www.bridgespan.org/>

**BoardSource:** BoardSource is a non-profit organization focused on improving non-profit board governance. Their website features resources on board development and organizational maturity.

Website: <https://boardsource.org/>

### National Council of Nonprofits:

The National Council of Nonprofits provides resources, tools, and best practices for non-profit organizations. They offer content related to non-profit capacity building and organizational development, which may include maturity models.

Website: <https://www.councilofnonprofits.org/>

**Nonprofit Finance Fund (NFF):** NFF is a non-profit organization that provides financial advice and resources to other non-profits. Their website features tools and resources related to financial management and capacity building, which may include maturity models.

Website: <https://nff.org/>

**Guidestar:** Guidestar is a platform that provides information on non-profit organizations, including their financials, operations, and impact. Their blog and resource library may contain articles and tools related to non-profit maturity models.

Website: <https://www.guidestar.org/>

**The Nonprofit Quarterly (NPQ):** NPQ is a magazine and online resource for non-profit leaders. They offer articles, research, and resources related to non-profit management, governance, and capacity building, which may include maturity models.

Website: <https://nonprofitquarterly.org/>

These websites provide valuable resources and insights related to non-profit organizational development and capacity building, which can include maturity models. While not every website may have specific maturity models, they offer useful frameworks and tools that can be adapted to assess and improve non-profit organizations' maturity levels.

## A5. Resource Mobilization Resources

aidóni should develop and maintain/update a resources list that can be reviewed in conjunction with any update to the fundraising strategy. This list should be in a format that can be easily shared, sorted and updated, with the ability to include comments about any experience, contact, etc. This could be part of the organization's CRM.

**Wikipedia:** Crowdfunded journalism.

Website: [https://en.wikipedia.org/wiki/Crowdfunded\\_journalism](https://en.wikipedia.org/wiki/Crowdfunded_journalism)

**Global Investigative Journalism Network (GIJN):**

Crowdfunding for Journalists.

Website: <https://gijn.org/crowdfunding-for-journalists-2/>

**Public Media Alliance.**

Website: <https://www.publicmediaalliance.org/>

**Grants & Opportunities.**

Website: <https://www.publicmediaalliance.org/resources/grants-opportunities/>

**Shorenstein Center on Media, Politics and Public Policy (Harvard Kennedy School).**

Website: <https://shorensteincenter.org/funding-the-news-foundations-and-nonprofit-media/> (2018 research, but it includes some useful data that could be updated with targeted research).

**Fund for Investigative Journalism.**

Website: <https://fij.org/apply-for-a-grant/>

## A6. Technology Roadmaps/Technology Maturity Models

Several websites provide resources related to technology roadmaps and technology maturity models for small non-profit organizations. These websites offer frameworks, tools, and best practices that can be helpful for organizations at various stages of technology adoption and development. Here are some relevant websites:

**TechSoup:** TechSoup is a non-profit organization that offers technology resources, including software, hardware, and services, to other nonprofit organizations. Their website features articles, webinars, and best practices related to technology planning and management for small nonprofits.

Website: <https://www.techsoup.org/>

**Idealware:** Idealware is a program of the nonprofit Tech Impact, which provides resources and research on software and technology for the nonprofit sector. They offer articles, webinars, and reports that help non-profit organizations make informed technology decisions.

Website: <https://www.techimpact.org/idealware/>

**NTEN (Nonprofit Technology Network):** NTEN is a membership organization that supports non-profit organizations in using technology effectively. Their website provides resources, webinars, and training on technology planning, strategy, and implementation for non-profits.

Website: <https://www.nten.org/>

**Nonprofit Technology Conference (NTC):** NTC is an annual conference organized by NTEN that brings together non-profit professionals to discuss technology trends, best practices, and tools. Attending the conference or accessing resources from past events can provide insights on technology roadmaps and maturity models for small nonprofits.

Website: <https://www.nten.org>

**Capterra:** Capterra is a software review website that offers insights on various technology tools and software solutions for non-profit organizations. Their blog and resources can help small non-profits understand and implement technology solutions effectively.

Website: <https://www.capterra.com/>

**Nonprofit Tech for Good:** Nonprofit Tech for Good is a blog and resource site that covers technology news, trends, and best practices for the non-profit sector. The website provides articles, webinars, and resources related to technology planning and management for small nonprofits.

Website: <https://www.nptechforgood.com/>

These websites provide valuable resources and insights related to technology roadmaps and technology maturity models for small non-profit organizations. They can be helpful for non-profits looking to assess and improve their technology adoption and development at different stages.

The following websites may be less relevant to a small nonprofit but provide useful information about technology roadmaps and maturity models. These websites offer frameworks, tools, and best practices that can be helpful for organizations at various stages of technology adoption and development. Here are some relevant websites:

**Gartner:** Gartner is a global research and advisory firm that provides technology-related insights, frameworks, and best practices. Gartner's Hype Cycle and Magic Quadrant can be helpful for understanding technology maturity and adoption trends.

Website: <https://www.gartner.com/>

**Forrester:** Forrester is a market research and advisory firm that offers technology-related insights, frameworks, and best practices. Their research and reports can be helpful for organizations looking to understand technology trends and develop roadmaps.

Website: <https://www.forrester.com/>

**MaRS:** MaRS is a Canadian innovation hub that supports startups and non-profit organizations in various sectors. Their website features resources on technology roadmapping, planning, and management.

Website: <https://www.marsdd.com/>

**MITRE:** MITRE is a not-for-profit organization that operates research and development centers sponsored by the US government. They provide resources on technology roadmapping and maturity models, including the Capability Maturity Model Integration (CMMI).

Website: <https://www.mitre.org/>

**TechSoup:** TechSoup is a non-profit organization that offers technology resources, including software, hardware, and services, to other non-profit organizations. Their website features articles, webinars, and best practices related to technology planning and management.

Website: <https://www.techsoup.org/>

**Info-Tech Research Group:** Info-Tech is a research and advisory firm that offers technology-related insights, frameworks, and best practices. They provide tools, templates, and research reports that can help organizations develop technology roadmaps and maturity models.

Website: <https://www.infotech.com/>

These websites provide valuable resources and insights related to technology roadmaps and technology maturity models. They can be helpful for emerging nonprofit organizations and startups looking to assess and improve their technology adoption and development at different stages.

## Appendix B. Nonprofit Management

### B1. Embedding Knowledge Management in Operations

#### What is the Role of an Operations Manual?

As aidóni grows from a small team with one leader and a dozen volunteers to a larger organization with potentially 50 employees, 100 freelance contractors, and a dozen volunteers, it's important to have an operations manual in place. An operations manual for a non-profit offers a comprehensive guide on policies, procedures, and best practices, ensuring alignment with its mission and objectives. It maintains consistency, efficiency, and compliance while serving as a valuable resource for training and onboarding.

The manual is connected to Knowledge Management by acting as a centralized repository, promoting standardization, consistency, and knowledge transfer. It supports continuous learning, improvement, and collaboration, enabling the organization to adapt to evolving needs and challenges while fostering effective communication among team members.

This manual will help ensure consistency, efficiency, and clarity in processes and procedures. The purpose here is not to provide a template for an operations manual but rather to illustrate how Knowledge Management can be integrated throughout an organization's operations, so that it is fully embedded and not an afterthought.

# Outline for an Operations Manual

Here's a suggested outline for an operations manual, with annotations related to embedded Knowledge Management aspects.

## Introduction:

- Purpose of the manual
- Scope and intended audience
- How to use the manual

## Organization Overview:

- Mission, vision, and values
- Organizational structure and hierarchy

«Effective Knowledge Management is crucial for the success of our organization, especially as we work with volunteers and expand our team. As part of our organizational structure and hierarchy, we recognize the need to integrate Knowledge Management practices across all levels and functions. This includes assigning clear roles and responsibilities for Knowledge Management activities, fostering cross-functional collaboration, and promoting a culture of knowledge sharing. Our leadership team is committed to supporting these efforts by providing resources, training, and tools that empower staff and volunteers to contribute their expertise, learn from others, and continuously improve our collective knowledge. In this way, our organization can efficiently harness the wealth of knowledge and experience within our team to drive innovation, enhance decision-making, and ultimately strengthen the impact of our work in independent media and journalism.»

- Board of directors and leadership team

## Human Resources:

“We emphasize the importance of embedding Knowledge Management practices in our HR processes to enhance the effectiveness and productivity of our staff and volunteers. By providing comprehensive onboarding and training, we ensure that new team members quickly acquire the necessary knowledge and skills to contribute effectively to our mission. We also encourage continuous learning and professional development, empowering staff and volunteers to share their expertise and learn from each other's experiences. In performance management and evaluations, we consider individuals' efforts to share knowledge and collaborate with others as key indicators of success. By fostering a culture of knowledge sharing and learning within our HR practices, we cultivate a well-informed and capable team that can drive innovation and growth in our independent media and journalism initiatives.”

- Hiring process and procedures
- Employee and volunteer onboarding and orientation
- Performance management and evaluations
- Compensation and benefits
- Training and professional development
- Time off, leave, and attendance policies
- Diversity, equity, and inclusion policies
- Workplace safety and health guidelines
- Conflict resolution and grievance procedures
- Termination and exit procedures

## Volunteer Management:

“We emphasize the integral role of Knowledge Management in supporting and optimizing the work of our volunteers, as well as in the overall volunteer management process. By effectively capturing, organizing, and sharing information related to volunteer roles, responsibilities, and best practices, we create a collaborative environment that enables volunteers to contribute their expertise and learn from one another. We also recognize the importance of providing volunteers with access to relevant resources, tools, and training, empowering them to stay informed and engaged in our mission. Moreover, by incorporating Knowledge Management practices into volunteer recruitment, orientation, and supervision, we can match volunteers with suitable roles and projects, while ensuring that their skills and experiences are leveraged effectively. In this way, Knowledge Management serves as a vital component of our volunteer management strategy, fostering a culture of learning, collaboration, and impact in our independent media and journalism initiatives.”

- Volunteer recruitment and selection
- Volunteer orientation and training
- Roles and responsibilities of volunteers

- Volunteer supervision and support
- Recognition and appreciation

## **Financial Management:**

- Budgeting and financial planning
- Accounting policies and procedures
- Financial reporting and audits
- Grant management and compliance
- Procurement and purchasing policies
- Expense reimbursement

## **Fundraising and Development:**

"We recognize the essential role of Knowledge Management in supporting and enhancing our fundraising efforts. By effectively capturing, organizing, and sharing information related to our donors, grants, and fundraising initiatives, we empower our team to make informed decisions and develop targeted strategies that maximize our funding potential. By leveraging Knowledge Management practices, we can identify successful fundraising tactics, learn from past experiences, and foster collaboration among staff and volunteers in developing new approaches. Furthermore, we can use our collective knowledge to engage and steward donors more effectively, ensuring that their contributions are utilized efficiently and transparently. In this way, Knowledge Management plays a critical role in strengthening our fundraising and development activities, enabling us to secure the resources needed to advance our mission in independent media and journalism."

- Fundraising strategies and tactics
- Donor management and stewardship
- Grant writing and reporting
- Sponsorships and partnerships
- Event planning and execution

## **Communications and Public Relations:**

- Branding and messaging guidelines
- Social media policies
- Media relations and press release procedures
- Crisis communication and management
- Internal communication and collaboration

## **Information Technology and Data Management:**

- IT policies and procedures
- Data privacy and security policies
- Hardware and software inventory and management
- Digital tools and platforms
- Backup and disaster recovery procedures

## **Programs and Services:**

- Overview of programs and services offered
- Program planning, implementation, and evaluation
- Partnerships and collaborations
- Client intake and service delivery policies
- Data collection, management, and reporting

## **Facility Management (eliminate if fully virtual):**

- Office space and equipment management
- Maintenance and repair procedures
- Security policies and procedures
- Emergency and evacuation plans

## **Legal and Compliance:**

- Overview of legal and regulatory requirements
- Non-profit status and tax compliance
- Intellectual property and copyright policies

## Formats for the Operations Manual

There are several innovative and cost-effective ways for a small non-profit with limited resources to make its operations manual easily accessible to employees:

**Digital copies:** Create a digital version of the operations manual in a format such as PDF, Microsoft Word, or Google Docs. This will allow employees to access the manual on their devices, and it can be easily shared via email or cloud storage services like Google Drive or Dropbox.

**Intranet or internal website:** Develop a simple intranet or internal website where the operations manual can be uploaded and accessed by employees. This platform can also host other essential documents, forms, and resources, making it a one-stop destination for organizational information.

**Collaborative platforms:** Use free or low-cost collaborative platforms such as Google Workspace, Microsoft Teams, or Trello to create an online space where employees can access, discuss, and collaborate on the operations manual and other essential documents.

**Mobile app:** Consider creating a simple mobile app or adapting an existing app to include the operations manual. This will enable employees to access the manual on their smartphones or tablets, making it more convenient and accessible on the go.

**Interactive multimedia:** Transform the operations manual into an interactive multimedia experience using free or low-cost tools like Canva, Genially, or Prezi. This can make the manual more engaging, visually appealing, and easier to navigate.

**Video or audio format:** Convert parts of the operations manual into video or audio format, which can be more accessible and engaging for some employees. These can be uploaded to a video-sharing platform like YouTube or Vimeo and accessed through a private link.

**Regular training and workshops:** Conduct regular training sessions and workshops to review and discuss the operations manual, ensuring that employees understand and can access the information they need. This also provides an opportunity to update the manual and gather feedback from employees.

**Physical copies:** Keep a limited number of physical copies of the operations manual in easily accessible locations within the office, such as in a break room or at employees' workstations, for those who prefer hard copies.

By employing a combination of these strategies, a small non-profit like aidóni can ensure that its operations manual is easily accessible to all employees, even with limited resources.

## B2. Fundraising Options List

The fundraising strategies listed below have a range of benefits. Some are primarily valuable in terms of raising funds but others help with diversification of funds, or help increase the organization's visibility, which may have broader impacts than just immediate fundraising. For each option on the menu, determine where it should fit on the resource mobilization maturity model. Is it something to include in the immediate future (year 1), something to consider within the 3-year horizon, or an option to push to the 5-year horizon?

- **Seek grants:** aidóni could research and apply for grants from foundations, government agencies, and other organizations that support the nonprofit's mission.
- **Host events:** aidóni could organize fundraising events such as auctions, dinners, or benefit concerts to raise money and awareness for the cause.
- **Launch a crowdfunding campaign:** aidóni could launch a crowdfunding campaign to engage with the community and raise funds for the organization.
- **Apply for sponsorships:** aidóni could seek sponsorships from local businesses or corporations that share the organization's mission and values.
- **Develop a major gifts program:** aidóni could develop a major gifts program to cultivate relationships with high-level donors who have the capacity to make significant contributions to the organization.

# Proposal Development/Grant Application Process Details

Process Steps	Knowledge Management Component
<b>Research and Identify Opportunities</b>	
Conduct funding source research	Don't reinvent the wheel, keep track of previous research.
Identify relevant grant programs or opportunities	Keep track of contacts and details gathered via conversations and meetings with potential sources of funding.
Assess eligibility and alignment with your organization's goals	If a funding source is not a good fit, make a note of it to avoid revisiting that source, or note to revisit in the future as appropriate.
<b>Gather Information and Assemble Team</b>	
Assemble a proposal or grant writing team	Can you pull from a skills inventory of your employees and volunteers?
Collect relevant organizational documents (mission statement, financials, etc.)	Are these foundational documents easily accessible in a centralized space where it is easy to find the most up-to-date version of all relevant documents?
Determine roles and responsibilities of team members	Do you have a standard, documented set of role descriptions for team members involved in proposal development/grant applications?
Develop a timeline for the application process	Do you have a template application timeline that can be adapted (to avoid reinventing the basics every time)?
<b>Analyze Request for Proposals (RFP) or Grant Guidelines</b>	
Review funding agency's goals, requirements, and evaluation criteria	
Identify key components and required documentation	Do you have a space/folder/repository where you can easily store/find documentation that is typically required?
Clarify any uncertainties or questions with the funding agency	
<b>Develop Project Idea and Outline</b>	
Brainstorm project ideas that align with the funder's goals	Do you have a repository of potential pitches and ideas that can start up a brainstorming session?
Develop a clear and concise project summary	
Create an outline of the proposal, including sections and headings	Do you have a template outline and associated style sheet to ensure consistency?

Process Steps	Knowledge Management Component
<b>Write the Proposal</b>	
Write the narrative, addressing each section of the outline	
Develop a detailed budget and justification	Do you have costing guidelines and a budget template? Do you have a repository of proposal budgets?
Include any required supplementary materials (e.g., letters of support, biosketches)	Are all these supplementary materials easily accessible and up-to-date?
Edit and proofread the proposal for clarity, consistency, and accuracy	Do you have a writing style guide and writing guidance to establish an aidóni standard for proposal writing and editing?
<b>Internal Review and Approval</b>	
Conduct an internal review of the proposal	Is there a minimal standard for review? What is the process? Where is that documented?
Address any feedback and make necessary revisions	
Obtain necessary approvals from your organization's leadership	
<b>Submission</b>	
Ensure all required documents and forms are completed	
Submit the proposal by the specified deadline	
Retain a copy of the submitted proposal for your records	Do you have a well-organized repository of submissions?
<b>Post-Submission Monitoring and Follow-up</b>	
Track the status of your application	Where will proposals and grant applications be tracked?
Respond to any requests for additional information or clarifications	
If awarded, comply with reporting and administrative requirements	
If not awarded, seek feedback from the funder and consider resubmission or alternative funding opportunities	How will the process be assessed over time? How will feedback be integrated into the process?

## B3. People Management: Leadership, Knowledge Gaps and Continuous Learning

### Nonprofit Leadership

As the leader of a non-profit organization working with volunteers, about to hire your first full-time staff, and focusing heavily on fundraising, it's crucial to assess your knowledge gaps and adapt to new challenges. Here are some steps you can take to identify your knowledge gaps in this specific context:

**Self-assessment:** Reflect on your current skills, knowledge, and experiences in volunteer management, staff hiring and management, fundraising strategies, and non-profit operations. Identify areas where you feel confident and areas where you feel less certain.

**Set clear goals:** Define your personal and professional goals, as well as the goals of your non-profit organization. This will help you identify the skills and knowledge required to achieve those goals, such as effective volunteer engagement, staff management, and fundraising capabilities.

**Seek feedback:** Request feedback from volunteers, staff, board members, and other stakeholders. Encourage them to be honest and constructive in their feedback, focusing on areas where you can improve, especially concerning volunteer management, staff development, and fundraising strategies.

**Benchmark against peers:** Compare your skills and knowledge to other leaders in similar non-profit organizations. This can help you identify areas where you may be lagging behind and highlight best practices that you can adopt.

**Identify sector trends and best practices:** Stay informed about trends, best practices, and emerging technologies in the non-profit sector, particularly in volunteer management, staff development, and fundraising. This will help you recognize areas where you need to update your knowledge or skills to stay competitive and effective.

By proactively assessing your knowledge gaps and taking steps to address them, you can ensure that your leadership skills remain effective and relevant as your non-profit organization grows and evolves.

### Staff Capabilities and Skills

The leadership skills assessment should be part of a broader assessment of individual staff, complementarities of staff skills and experience as the core team grows, as well as broader organizational capabilities. Organizational capabilities will grow over time and should dynamically evolve and adapt to the rapidly changing external environment in which the organization operates. The leadership needs to stay on top of external trends to ensure that a) the existing internal skills set and capabilities match current requirements; b) future requirements in terms of skills and capabilities are anticipated either with new hiring or with build-in forward-looking learning. A current example would be the ability to quickly pivot to learn how the organization needs to embed the use of generative AI in its work or how generative AI impacts its work.

Some related ideas:

- Conduct an internal workshop to discuss generative AI with volunteers, to assess the volunteers' current knowledge and attitudes towards generative AI, and to convey any guidelines regarding use of generative AI in support of their work, including security and IP issues.
- Develop some guidance for volunteers' use of generative AI and provide recommended sources for learning more.
- Join an AI in Journalism group, attend related events.

## Skills Inventory – Alignment with Maturity Model

Applying the maturity model to the volunteer, staff, and freelance skills database involves progressively improving the organization's ability to create, maintain, and leverage the database as the organization grows and evolves. Here's how the maturity model can be applied:

### Stage 1: Year 1 – Emerging

- **Basic skills inventory:** Create a simple spreadsheet or document to record the skills, experience, and interests of volunteers, staff, and freelancers. This can be done using tools like Microsoft Excel or Google Sheets.
- **Ad-hoc updates:** Encourage staff, volunteers, and freelancers to provide updates on their skills and interests on an ad-hoc basis or during performance evaluations.
- **Informal skills matching:** Use the skills inventory to match available talent with organizational needs or specific projects on a case-by-case basis.

### Stage 2: Year 3 – Developing

- **Structured skills database:** Develop a more structured skills database using tools like Microsoft Access or a simple CRM system to store and manage volunteer, staff, and freelance profiles.
- **Regular updates:** Implement a process for regular updates to the skills database, such as annual skill assessments or self-assessment questionnaires.
- **Standardized skills matching:** Establish a standardized process for matching available talent with organizational needs or specific projects, using the skills database as a key resource.
- **Integration with other systems:** Begin integrating the skills database with other organizational systems, such as project management tools or HR software, to streamline talent management and resource allocation.

### Stage 3: Year 5 – Mature

- **Advanced skills management system:** Implement a comprehensive skills management system or talent management software to maintain a detailed and up-to-date record of volunteer, staff, and freelance skills, experience, and interests.
- **Continuous skills development:** Encourage and support continuous skills development for volunteers, staff, and freelancers through training and professional development opportunities.
- **Automated skills matching:** Utilize advanced algorithms or AI-based tools to match available talent with organizational needs or specific projects, maximizing resource allocation efficiency.
- **Seamless integration with other systems:** Ensure seamless integration between the skills database and other organizational systems, such as HR, project management, and Knowledge Management systems, for a holistic approach to talent management.

## B4. Social Entrepreneurship

### Benefits of Approaching Sustainability from a Social Enterprise Standpoint

**Holistic Impact:** Social entrepreneurship emphasizes addressing the root causes of social, environmental, and economic issues, which can lead to more sustainable, long-term solutions.

**Innovation:** By adopting a social entrepreneurship mindset, nonprofits can become more innovative and develop creative solutions to address complex social and environmental challenges.

**Financial Sustainability:** Social entrepreneurship promotes the development of revenue-generating activities and diversified funding sources. This can contribute to financial stability, reduce dependency on donations, and increase the organization's capacity to invest in its mission.

**Scalability:** Social entrepreneurship can help nonprofits scale their impact by encouraging the replication or adaptation of successful models in different contexts or regions.

**Collaboration and Partnerships:** Social entrepreneurship fosters collaboration between nonprofits, businesses, and public sector organizations, which can lead to more effective and efficient solutions to social and environmental problems.

**Increased Public Awareness:** By engaging in social entrepreneurship, nonprofits can raise awareness about the social and environmental issues they address, mobilize public support, and influence policy changes.

**Talent Attraction and Retention:** Social entrepreneurship can help nonprofits attract and retain talented individuals who are passionate about social change, as they can provide a platform for personal and professional growth.

**Enhanced Reputation:** Nonprofits that engage in social entrepreneurship can enhance their reputation among stakeholders, including donors, partners, and beneficiaries, by demonstrating their commitment to sustainable impact.

**Learning and Adaptation:** Social entrepreneurship encourages non-profits to continuously learn, adapt, and improve their strategies and operations, making them more resilient and better able to respond to changing circumstances.

**Ethical Leadership:** Embracing social entrepreneurship can help nonprofits demonstrate ethical leadership by prioritizing social and environmental concerns in their decision-making processes and operations.

### What does Social Entrepreneurship Mean for a Nonprofit?

Social entrepreneurship for a non-profit can be defined as a mission-driven approach that combines the passion for creating positive social and environmental impact with innovative, sustainable, and business-like practices to address complex societal problems. This approach transcends the traditional non-profit model by incorporating revenue-generating activities, collaborations, and partnerships to achieve greater self-sufficiency and scale.

In essence, social entrepreneurship for a non-profit involves:

- **Mission-driven focus:** Prioritizing social and environmental objectives alongside organizational goals, striving to create long-lasting, systemic change in the community or society at large.
- **Innovation:** Developing creative and out-of-the-box solutions to address social and environmental challenges, often by combining elements from the non-profit, for-profit, and public sectors.
- **Sustainability:** Emphasizing financial, environmental, and social sustainability in the organization's operations and programs, seeking to minimize negative impacts and maximize positive outcomes.
- **Revenue generation:** Engaging in revenue-generating activities, such as social enterprises

or fee-for-service models, to diversify funding sources, reduce dependency on donations, and increase the organization's capacity to invest in its mission.

• **Scalability and replication:** Designing programs, initiatives, and models that can be scaled or replicated to amplify impact and address social and environmental issues in different contexts or regions.

• **Collaboration and partnerships:** Building strategic alliances with stakeholders from various sectors, including businesses, government entities, and other non-profits, to leverage resources, expertise, and networks for greater impact.

- **Learning and adaptation:** Continuously evaluating and refining the organization's strategies, operations, and programs based on data, feedback, and lessons learned to improve effectiveness and efficiency.
- **Accountability and transparency:** Ensuring responsible management of resources, clear

communication with stakeholders, and rigorous measurement of social and environmental outcomes to build trust and credibility.

- **Empowerment and capacity-building:** Fostering the development of local capacity, leadership, and self-reliance among beneficiaries and communities to ensure lasting change.

By adopting the principles of social entrepreneurship, aidóni can become more innovative, financially stable, and impactful, ultimately contributing to a more sustainable and just world.

## Integrating Social Entrepreneurship and Knowledge Management

Integrating social entrepreneurship and Knowledge Management can help a non-profit in the emerging stage of maturity to leverage its strengths and accelerate growth. In the context of independent journalism focused on conflict reporting and support for change agents in conflict contexts, here are some ways to integrate these concepts:

- **Develop a social entrepreneurship strategy:** Create a social entrepreneurship strategy that focuses on generating social impact through independent journalism and conflict reporting. Identify ways in which the organization's journalistic work can support change agents in conflict contexts, such as by raising awareness, advocating for policy changes, or facilitating dialogue among stakeholders.
- **Foster a culture of knowledge sharing:** Encourage staff, volunteers, and partners to share their expertise, insights, and experiences in conflict reporting and supporting agents change. This can be achieved through regular meetings, workshops, or online platforms designed to facilitate knowledge exchange.
- **Leverage knowledge assets:** Use the organization's knowledge assets, such as research, case studies, and best practices, to inform and enhance its social entrepreneurship initiatives. For example, the organization could develop training programs, resources, or toolkits for change agents in conflict contexts, based on its unique insights and expertise in conflict reporting.
- **Collaborate with stakeholders:** Establish partnerships and collaborations with other nonprofits, media organizations, and relevant stakeholders to amplify the organization's social impact and knowledge sharing efforts. This can lead to joint projects, shared resources, and increased visibility for the organization's work in conflict reporting and support for change agents.
- **Continuous learning and improvement:** Monitor and evaluate the effectiveness of the organization's social entrepreneurship initiatives and Knowledge Management practices. Use this feedback to continuously improve and adapt the organization's approach to achieving its social impact goals.

- **Capacity building:** Invest in building the organization's capacity in both social entrepreneurship and Knowledge Management, through training, resources, and skills development. This includes enhancing the organization's skills in social impact measurement, conflict reporting, and knowledge sharing.

- **Technology integration:** Implement appropriate technology tools and platforms to support Knowledge Management and social entrepreneurship efforts, such as collaboration tools, document management systems, and platforms for sharing and disseminating journalistic content.

By integrating social entrepreneurship and Knowledge Management, the non-profit can leverage its unique strengths in independent journalism and conflict reporting to support change agents in conflict contexts. This approach can help the organization to create a positive social impact, accelerate growth, and build a strong foundation for long-term success.



**Tip:** Elements listed above that resonate the most with aidóni's approach and stage of maturity can be integrated into marketing and proposal language, positioning aidóni as a nonprofit with a strong social enterprise approach and entrepreneurial culture, as well as a robust approach to Knowledge Management.

# Appendix C. Technology

## C1. Technology Roadmap

Here is a the outline of a suggested technology roadmap:

### Needs Assessment:

- Identify the organization's technology needs, priorities, and challenges specific to remote work
- Determine the desired outcomes and functionalities for each technology solution

### Infrastructure:

- Ensure reliable, secure internet connections for all team members
- Provide essential hardware, such as laptops, headsets, and webcams
- Implement data backup, cybersecurity measures, and VPN access for secure remote work

### Communication & Collaboration:

- Adopt cost-effective communication tools like email, messaging apps, or VoIP services
- Use free or low-cost collaborative platforms like Google Workspace or Microsoft Teams for document sharing, project management, and virtual meetings

### Project Management & Task Coordination:

- Utilize user-friendly project management tools like Trello, Asana, or Basecamp for task assignment, tracking, and collaboration

### Virtual Meetings & Webinars:

- Choose reliable video conferencing platforms like Zoom, Google Meet, or Microsoft Teams for virtual meetings, webinars, and online training sessions

### Cloud Storage & File Sharing:

- Implement secure cloud storage solutions like Google Drive, Dropbox, or OneDrive for easy file sharing and access among team members

### Remote Work & Time Management:

- Use time tracking and remote work management tools like Clockify, Toggl, or Time Doctor to monitor work hours, productivity, and progress

### Donor Management & Fundraising:

- Implement donor management software like DonorPerfect, Bloomerang, or Little Green Light to track donations, manage contacts, and streamline fundraising efforts

By following this technology roadmap, aidóni can create an effective, efficient, and secure remote work environment. The roadmap emphasizes cost-effective solutions and continuous improvement, enabling the organization to adapt to evolving needs and leverage technology to achieve its mission.

## C2. Google-based intranet with secure Google drive

If you are considering investing in an Intranet platform, the first step would be to identify key requirements and align with the organization's path to growth along the maturity model.

Setting up an intranet that is compatible with your existing Google suite can be a great way to streamline communication, collaboration, and knowledge sharing among your volunteers. Before jumping into a specific solution and investing in an intranet solution, take the time to clearly define your requirements, follow these steps:

- **Identify your objectives:** Determine the key objectives for implementing an intranet. These could include improving communication, enhancing collaboration, centralizing important documents, or streamlining processes.
- **Consult with stakeholders:** Speak with volunteers, team leaders, and other stakeholders to understand their needs, expectations, and potential challenges. This will help you tailor the intranet to address their requirements effectively.
- **Assess your current tools:** Take an inventory of your current tools, especially those within the Google suite, and identify any gaps or overlaps in functionality. Your intranet should complement and integrate with these tools.
- **Define key features:** Based on your objectives and stakeholder input, create a list of key features and functionalities that your intranet should have. These may include file sharing, project management, event calendars, discussion forums, and more.
- **Prioritize features:** Rank the features based on their importance to your organization, taking into consideration both the short-term and long-term goals.
- **Integration with Google suite:** Ensure that the intranet solution you choose can integrate seamlessly with your existing Google suite tools, such as Google Drive, Google Docs, Google Sheets, Google Calendar, and Gmail.
- **Security and data privacy:** Define your security and data privacy requirements, including data access levels, data encryption, and data storage location.
- **Scalability and customization:** Choose a solution that can scale with your organization as it grows and allows for customization to meet your specific needs.
- **Budget:** Determine your budget for the intranet, including setup costs, ongoing maintenance, and potential upgrades.
- **Create a requirements document:** Compile all of the information gathered into a comprehensive requirements document. This document will serve as a guide when evaluating potential intranet solutions and discussing your needs with vendors.

Once you've defined your requirements, you can start researching and evaluating intranet solutions that meet your needs. Google's own solution, Google Workspace (formerly G Suite), could be a suitable option, as it offers an integrated suite of collaboration and productivity apps that work seamlessly together. Other third-party intranet solutions may also be compatible with Google suite, so be sure to explore all available options.

## Outline for aidóni Digital Workplace Guide

### Introduction

- Purpose of the guide
- Scope and intended audience

### Overview of Digital Tools

- List of tools used in the organization, categorized by function (communication, collaboration, file sharing, knowledge sharing, etc.)

### Communications

- Tool overview and purpose (e.g., email, chat, video conferencing)
- Best practices for using each communication tool
- Etiquette and guidelines (e.g., response times, tone, and content)
- Troubleshooting and support contacts

## Collaboration

- Tool overview and purpose (e.g., project management, task tracking, shared calendars)
- Step-by-step instructions for using each collaboration tool
- Tips for effective collaboration and teamwork
- Troubleshooting and support contacts

## File Sharing

- Tool overview and purpose (e.g., Google Drive, Dropbox)
- Instructions for uploading, downloading, sharing, and organizing files
- Permissions and access levels
- File naming conventions and folder structure
- Troubleshooting and support contacts

## Knowledge Sharing

- Tool overview and purpose (e.g., intranet, wiki, shared documents)
- How to access, contribute, and update knowledge resources
- Guidelines for content creation and curation
- Troubleshooting and support contacts

The initial guide does not need to be comprehensive. It will need to grow and evolve over time, in alignment with stages of the maturity model and the technology roadmap. Once you have completed the initial guide (Version 1.0), make sure to keep it up-to-date and easily accessible to all volunteers and staff. You may also consider conducting periodic training sessions or workshops to help users become more familiar with the tools and ensure effective usage. Include an annual review and update of the guide in your KM processes.

Some of the sections on good practices should ideally be updated in close consultation with the audience for this guide, the volunteers and staff. To facilitate access, the guide can be presented in multiple formats. It can be presented as a wiki or an intranet html-based page, with intuitive navigation between the sections. Alternatively it can be presented as a single PDF document. Having multiple formats increases the burden of having to update all versions when changes are made. Apply strict version control so that only the most up-to-date version of the document is available to volunteers and staff. If the guide is downloadable, you cannot strictly control what version volunteers and employees are looking at.

## Security and Data Privacy

- Overview of the organization's security and data privacy policies
- Password management and best practices
- Tips for recognizing and avoiding phishing attacks and other online threats
- Reporting security incidents or data breaches

## Training and Onboarding

- Overview of training resources and opportunities
- Instructions for accessing and completing training modules or courses
- Guidance for new volunteers and staff on getting up to speed with digital tools

## Frequently Asked Questions (FAQs)

- A list of common questions and answers related to the digital tools

## Support and Resources

- Contact information for technical support or help with the digital tools
- Links to user guides, tutorials, or additional resources