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What about us? Exploring small to medium Australian not for-profit firms and knowledge management

Craig Hume and Margee Hume

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Abstract

Purpose – *The aim of this paper is to research the practice of knowledge management (KM) in not-for-profit (NFP), small and medium enterprises (SMEs) to identify gaps in the current body of knowledge. Previous work has been conducted in small, medium and large enterprises; however, NFP SMEs have been underexamined. Given the prevalence of NFP, SMEs' further research is warranted.*

Design/methodology/approach – *Using a case study methodology, this research advances previous KM work (Hume and Hume, 2008). Based on previous work in SMEs, KM and the application to NFP organizations, this work offers a set of propositions related to strategic development of KM in NFP organizations with multiple data sources across hierarchical levels sought and analyzed within each of the case studies. This process provided data variation. Collection continued until theoretical saturation was achieved. The paper supports analysis with the use of Leximancer 3.0 and offers a unique approach to qualitative research using textual and narrative analysis.*

Findings – *This paper explores the definition of knowledge, the importance of knowledge planning, capture and diffusion and offers development in NFP SMEs. The paper concludes by introducing the link between KM and internal marketing to address the importance of cultural and social issues of "me" which are central to knowledge capture, renewal and sustainable KM in NFP organizations. The paper introduces socialization strategies and informal knowledge capture specific to the transient, volunteer and permanent employee mix in NFP organizations and introduces the notion of understanding the significance of social mission to employees and volunteers in the embodiment of KM.*

Research limitations/implications – *This study has aimed to access all empirical articles in the field of KM in SMEs. To ensure the consideration of the advancement in wireless, mobile computing technology and smartphones as KM support, articles from 2005 onwards were primarily sought. This search restriction has limited the role of earlier works in the research. It is arguable that the sample cases may not offer a comprehensive coverage of all NFP firms, with the qualitative approach further limiting the generalization of the findings.*

Originality/value – *To the best of the authors' knowledge, KM has been applied specifically in very few NFP SME firms, with scant exploration of the constructs of socialization, social mission and informal knowledge structure in NFP considered or previously published in academic journals.*

Keywords Knowledge management systems, Internal marketing, Knowledge transfer, Knowledge management, Knowledge sharing, Non-profit organizations

Paper type Research paper

Introduction

Examination of not-for-profit (NFP) organizations and knowledge management (KM) in NFP organizations is rudimentary (Ragsdell *et al.*, 2014; Andreasen *et al.*, 2005; Rainey *et al.*, 1976; Hume and Hume, 2008; Helmig *et al.*, 2004). To move forward in KM and NFP research, we must examine and understand the translation and integration of KM into small and medium enterprises' (SMEs) NFP contexts and identify how KM can best be developed and adopted in these smaller NFP firms. These firms represent the largest percentage of the NFP sector in Australia, and, as such, research in this area warrants more attention (Australian Productivity Commission, 2010; Lyons, 2001, 1999). Much is known about the application and practice of KM in for-profit firms, both corporate and SMEs; however, many

for-profit business practices do not appear to translate easily to NFPS, with this evident in the implementation of KM in NFPs (Riege, 2005). Previous research into large NFP firms identifies that KM is recognized in the firms as a practice that can support operations, but it is often not viewed as a priority investment (Hume *et al.*, 2012a, 2012b). Adoption in the NFP SMEs is limited and informal (Lettieri *et al.*, 2004), and, unlike the for-profits, it is rarely seen as operationally supportive or a likely investment or conducted in a "managed" KM process in these NFP organizations and SMEs. This research will improve the understanding of the requirements of a KM process in these NFP SMEs and suggests that knowledge can be identified, captured and distributed in an unintentional and informal manner supporting operations and minimizing the expense of KM implementation.

Although often used in management research, case study methodology and narrative thematic analysis has had limited application in the information systems and KM fields, and it presents an excellent methodology for exploratory work. This method is appropriate for this examination to gather a rich and deep description of KM in the NFP SME environment.

McAdam and Reid (2001) and others compared small and large firms and the perception of KM over a decade ago, finding that large firms accepted KM and its value, whereas the SME sector was less advanced, with an accidental approach to knowledge and low investment in KM approaches and systems (Desouza and Awazu, 2006). These researchers emphasized that SMEs do not manage knowledge the same way as larger organizations and they do not merely scale-down practice to fit. Desouza and Awazu (2006) introduced the notion that SMEs have limitations in managing knowledge and need to develop creative practices that fit their business constraints.

Other researchers examining KM in professional firms and for-profit corporations have suggested that in communities of practice and Web communities, experts cluster together with like-minded employees to create collegial groups and informal bonds (Empson, 2001). This is known as the application of socialization (Yu, 2002). Empson (2001) suggested this notion as atypical in NFP SMEs and for-profit SMEs, as expertise is often concentrated with the CEO and the social entrepreneur and socialization and knowledge group formation occurs at other levels (Hume *et al.*, 2012b). Rather than expertise and qualification, the transient and volunteer workforce evident in NFP organizations (Lyons *et al.*, 2006; Lyons, 1999) develops personal bonds through workplace presence, employment tenure with the NFP and common work shifts (Hume *et al.*, 2011). Hutchinson and Quintas (2008) reviewed the literature around SME firms, introducing SMEs into the wider KM discussion. It was proposed that advanced research was warranted to understand knowledge benefits for SMEs with SMEs, as it was a poorly understood area. They examined KM in the SME context and they supported the findings of others. They suggested that most KM research has been conducted in large firms, with SMEs relying heavily on informal knowledge. They did note a few anomalies, with a few SMEs adopting more formalized KM strategies; yet, this was rare. Interestingly, Durst and Runar (2012), recently, conducted a literature review of KM in SMEs. They found that knowledge identification, knowledge storage/retention and knowledge utilization were poorly understood in SMEs. The few studies found by Durst and Runar (2012) highlighted the benefits of KM, yet offered minimal learnings on implementation and practice apart from the role of informal knowledge.

NFP researchers have suggested that knowledge in a non-profit context is too unwieldy to manage without strategy and dedicated resourcing; therefore, the management and operational focus for NFP SMEs should be on core service delivery and fulfilling their firm mission (Riege, 2005). Ideally, developing a generic KM strategy and framework for these smaller non-profit firms could reduce the perceived costly and resource-intensive approach to this practice for this sector. For the many different NFP enterprises (Crossan *et al.*, 2004; Salamon and Anheier, 1992) that exist with differing purposes and practices, the relative ease of developing a "generic KM strategy" remains complex.

Unlike previous research conducted, this research contributes to the discourse in this area by specifically examining NFP SMEs. This research considers the previous research in SMEs and proposes that NFP organizations are not just scaled-down large firms and may not be similar to for-profit SMEs.

It is proposed that, like commercial for-proft SMEs, informal knowledge may be the basis of KM in the NFP setting. However, this research proposes that specific management of the transient and volunteer worker in NFP organizations contributes substantially to this (Borgonovi, 2008; Isham et al., 2006). It is proposed that the transient volunteer NFP worker is motivated by support of the social mission and the delivery of the mission (Kong, 2007; Brown and Ferris, 2007) rather than business profits and business operations, thus undervaluing the role and processes involved with KM (Borgonovi, 2008; Isham et al., 2006). It is proposed that like the commercial SMEs, NFP SMEs need to be creative in the management of knowledge. This research will contribute to knowledge by examining NFP SMEs and building on the notion of informal/tacit knowledge in SMEs and advancing the perception of the socialization and its importance to knowledge capture and distribution in NFP organizations and SMEs.

This research aims to develop and inform a foundation model for this context considering the many inherent differences of NFP SMEs and the differences within the NFP sector. Through case analysis, this research will understand that the KM "system" is more holistic than an information technology (IT) system that supports knowledge capture and distribution and involves a number of enabling elements of knowledge strategy, people, process, leadership and culture that must be considered.

Specifically, this paper addresses the following questions:

> Q1. What are the key business practices in NFP SME cases that support KM (such as knowledge capture and renewal) in NFP organizations?

> Q2. What practices support the successful implementation of KM?

This work will contribute to the theoretical and practical knowledge in fundamental strategic and operational characteristics for designing and sustaining a successful KM programme (Davenport and Prusak, 1998; Choy and Suk, 2005; Riege, 2005) in NFP organizations. Specifically, the influential work of Riege (2005) in the identification of the many personal, organizational and technological barriers to knowledge sharing will be further explored by making explicit the fundamental organizational assets and processes that *must* occur for KM operation and sustainability in NFP organizations. Further, this research will support the seminal work of Ballantyne (2000, 2003, 2004) in reinforcing the critical linkage between KM, socialization and internal marketing (IM) to sustain knowledge sharing and renewal within the organization. Most importantly, this work will provide an extension to the exploratory research done by Lettieri et al. (2004) and Vasconcelos et al. (2005) in the NFP environment on current KM practices and the challenges this diverse industry sector faces in managing its knowledge. Finally, it will advance the research of Hume and Hume (2008); Hume et al. (2012a, 2012b). The research will also make a number of practical contributions in the areas of KM in an NFP SME context. More specifically, identifying and debunking a common perception that KM in NFP organizations is a common process is driven by IT and advanced understanding of the operation and sustainability of KM.

KM in NFP research

The literature clearly supports the growth of interest in KM-style initiatives by NFP organizations, but it appears to lack practical application and any empirical testing from using a broad definition of NFP organizations (Lyons, 2009). Further, research into the application of KM strategies in NFP organizations, focusing on specific issues of knowledge development and diffusion strategies via the application of "popular" socialization strategies such as Communities of Practice (CoPs) for example and the approach to supporting externalization and internalization strategies, is limited (Wenger

and Snyder, 2000). These research gaps have very practical implications and value for the NFP sector that is increasingly in need of KM that can address the increasing service need and competitive drivers. This case analysis will create a strong foundation for a knowledge-planning framework, its application and practice in specific NFP SMEs. This paper will provide greater rigor to the propositions presented thus far in the KM discourse and provide the depth and breadth that is needed to provide meaningful academic and management insights. Because of the limited specific research in this area, this work is exploratory.

These early emerging propositions are suggested specifically as follows:

P1. The adoption of KM in the NFP sector is limited and very informal as suggested by Lettieri *et al.* (2004) and Riege (2005).

P2. Implementation is constrained by limited funding, limited resources (Lyons *et al.*, 2007) and high accountability to members and the public as suggested by Helmig *et al.* (2004).

P3. Knowledge is too unwieldy to manage in an NFP environment, and the primary focus for NFP SMEs is on core service delivery and fulfilling their mission as suggested by Helmig *et al.* (2004).

P4. KM practice and sustained operation is strongly supported by socialization strategies and IM and promotion of KM as suggested by Ballantyne (2000, 2004) and Hume and Hume (2008) and Hume *et al.* (2012a, 2012b). With these, socialization strategies differ to those observed in large, for-profit firms and SMEs.

P5. KM practices are complicated by the nature of the NFP employees, transient workers and volunteers. (Borgonovi, 2008; Isham *et al.*, 2006, Hume and Hume, 2008; Hume *et al.*, 2012a, 2012b).

Data and method

Exploratory research is a flexible and valuable tool for social science research (Babbie, 1989; Churchill, 1979; Kinnear and Taylor, 1996). The objective of exploratory research is to assist in breaking broad and vague problems into smaller and more precise issues (Patton, 1990), increasing the researcher's familiarity with a problem and clarifying concepts (Churchill, 1979; Miles and Huberman, 1994; Zikmund, 1991; Churchill, 1979). Exploratory research has limitations. The interpretation of the findings is usually subjective and with small sample cases that cannot be projected to a wider population (Zikmund, 1991; Miles and Huberman, 1994). This paper adopts a case study methodology to identify overall themes and practices and offers a deep understanding of KM. The two cases for examination are reflective and retrospective and include a range of small to medium Australian NFP organizations. The case studies included in-depth interviews, content and document analysis and focus groups until theoretical saturation and no new information were found.

This research adopts a qualitative approach and uses a combination of in-depth interviews, workplace observations and document collection to explore and gather a contextualized understanding of the measures and evaluations of the capture, management and renewal of knowledge in an NFP setting. Case 1 included 10 staff interviews, 2 focus groups and 3 visits and Case 2 included 14 staff interviews, 2 focus groups and 3 visits. The focus groups were completed with volunteer and part-time staff for convenience and accessibility, and identical questions and protocols were applied. The in-depth interviews sampled staff with permanent and substantive roles within the NFP SMEs. As recommended by Eisenhardt (1989) and Patton (1990), the research sample was purposively selected to provide a maximum variation to assess replication logic for theory-building purposes. Purposive sampling was combined with convenience sampling based on NFP organizations that were accessible and interested in participating in the research. The underlying principle to the sampling technique was to provide information-rich cases that are worthy of in-depth study.

Multiple data sources across hierarchical levels, together with observation and relevant document collection, were sought within each of the case studies to provide the data variation and the theoretical saturation as recommended by Glaser and Strauss (1967), Eisenhardt (1989); Eisenhardt and Graebner (2007) and Perry (1998). The document types included but were not limited to: work manuals including occupational health and safety, human resource manuals, intranet brochures, group e-mails and group space correspondence, newsletters, promotional material for donors and recipients and training materials. A feedback suggestion document in the form of a journal and meeting minutes was also reviewed in Case 1 and staff meeting minutes considered in Case 2 that covered similar content. Visits to each of the firms happened throughout the research, and staff interactions, knowledge sharing and dialogue about knowledge were documented. Workplace observations consisting of silent observation in telemarketing rooms and bystander observation in handover and staff meetings were also undertaken. Notes were recorded in the observations. Theoretical saturation with no new emergent themes was achieved in Case 1 at 10 interviews and 3 visits and Case 2 at 14 interviews and 3 visits. Each case required two focus groups to further drill down into themes, and a comprehensive coverage of types was achieved which are undertaken in the latter part of the study. The focus groups sampled volunteers and part-time staff for convenience.

The data from the multiple sources were divided into themes and categories based on literature findings and were examined for frequency in response and occurrence to highlight importance and recurrence. The documents were also examined using thematic analysis and researcher induction. Thematic analysis in its simplest form is a cataloguing strategy for qualitative data with the research using their expertise to conclude judgement. Researchers review their data and scripts, making notes and sorting data and narratives into categories. This process aims to discover patterns and emergent themes. Thematic analysis is often implicitly and explicitly a part of other types of data analysis, including case study, and is a sound process of organising qualitative information (Braun and Clarke, 2006).

The next stage progressed to narrative and textual analysis, a subfield of discourse studies. A computer-assisted text analysis of the interview transcripts was undertaken using Leximancer 3.0 (Smith, 2000) and it relied on a corpus-based approach (Stubbs, 1996). One advantage of the use of the Leximancer 3.0 system, it is argued, is that it makes the investigator aware of the global context and significance of concepts and helps avoid fixation on particular anecdotal evidence, which may be atypical or erroneous (Smith and Humphreys, 2006). Identification of the dominant themes of the cases was undertaken by examining the maps and was cross-referenced with a narrative analysis undertaken by the researchers. Leximancer stochastically calculated the concepts in the corpus, as recommended by McKenna and Rooney (2005). This visualization technique enabled the investigators to see, in a global representation, the important concepts in the corpus and relationships between these concepts. Concepts that occur in very similar semantic contexts tend to form clusters. Each map is then used by the investigator to present an overall representation of the corpus and to guide interpretation. In a departure, maps were then compared to identify common narratives and overall patterns and comparing and contrasting patterns leading to an enriched interpretation.

Case descriptions and identification

This section of the paper will offer the descriptions of each case and discuss the relevant practices and activities occurring in the firm. Using data analysis from Leximancer 3.0 output, the key and global concepts and the NFP case material and interviews are compared and discussed. The maps identify the global nodes of each firm. These are then used as a guide to interpret the narratives. This process offers affirmation and verification of the case analysis and adds to the ethnography. A

combined analysis of all firms is presented as per the Leximancer as well as manual script coding and interpretation.

SME–NFP case analysis

Individual maps

Examination of all maps, themes and concepts within the maps led to the identification of a number of recurring themes. Themes of knowledge, socialization, marketing and information were consistently identified in the maps of narratives of all cases and case material. Some case maps identified *Marketing* and *Knowledge* explicitly or specific practice and engagement approaches such as *Work* and *Social* as key nodes central to the map; this appeared to align with social mission. Specific firm material and documentation were analysed separately and are included in some narratives and support many of the themes/central node results from each firm. Many themes and nodes also related to the specific concerns and challenges of KM, for example, *Problems and Issues*, also appeared frequently in the individual maps.

Cross-map comparison

Moving beyond the individual maps, comparing and contrasting the maps led to the identification of patterns, allowing an enriched interpretation. Some overall themes were identified by considering the nodal themes, their centrality in the map, relationship with other nodal themes and concept pathways within the nodal themes. Three global and frequent themes were identified:

1. *Marketing*: This focused on internal communications and promotion of the uses, availability and value of KM;

2. *Knowledge*: This is related to the importance of KM to the organization strategically and operationally and the understanding of the need for knowledge identification, capture and renewal; and

3. *Social*: Identifying the importance and need for social exchanges, people and the organization in the capture and diffusion of knowledge.

Case 1: environmental protection

The paper will proceed first with the case facts and descriptors. Case 1 is a larger SME with 200 employees/staff across a nationally organized entity. With 30 years of experience in creating sustainable environmental outcomes, the organization promotes itself as a solutions-driven organization that is committed to practical environmental problems. Key projects include salinity, declining water quality, soil degradation and climate change and biodiversity loss. This firm thrives on scientific knowledge and community engagement and has a large voluntary staff of varying levels of education. Many permanent staff are educated and experienced in their fields of horticulture and environmental sciences.

"Knowledge" in the organization: the distinction between information and knowledge

Case 1 participants suggested that knowledge "is anything that helps get the job done" and "includes either documented or tacit information in people's head that they share with others on the project site and/or in the office". Knowledge was largely seen as technical, scientific-based information focused on "the What and How, but not so much the simple and straightforward – Why, which is where the gold, the knowledge, lies".

The "Why" was seen as the key "missing link" in the knowledge-capturing efforts. Information and knowledge were blurred in this case because of the expectation that knowledge was documented as a standard task, but, in fact, it was simpler, lower-level operational information such as policy, administration activity that was predominantly documented. Labour shortage was proposed as one of the primary reasons that KM was

not regularly in practice, with statements like "not enough time and resource, you move on to the next project" and "too busy to capture it" were encountered. Generally, the NFP mission delivery/operations focus blurred the opinion on the strategic importance of knowledge capture and storage. A lot of "unofficial" information and knowledge that was generated within work groups was not captured and was suggested to be "too hard to capture, it's more about getting the work done". The informal channels and informal sharing worked well when knowledge was sought through "friends" and/or subject matter experts; however, membership to informal networks was primarily socially defined and did not always consist of timely, accessible and accurate information. Version control of documentation was also cited as a key problem. Finally, the longevity of these informal social networks was limited due to the volunteer workforce.

Knowledge collection, co-ordination and distribution knowledge

Specific data collection practices included tracking people's role, qualifications and experience, but the staff directory was not always up to date and access was largely office-based. Interestingly, capture of this information was proposed to lead to subject matter experts and CoPs being identified and developed. "We don't have a knowledge leader but for important projects we come together and share in a group". No formal KM co-ordination process was evident with information management, with documents managed under the guise of a "QA (Review and Approve) system".

The missing "know, how and why" appeared to get lost in the bureaucratic and "sometimes overly critical, academic process".

The CEO's personal assistant performed a lot of the information- and knowledge-distribution tasks by virtue of self-empowerment to help people and the organization have some regular capture and distribution, "I often circulate things for comment and then send back to everyone when done". There was a general awareness and understanding of the knowledge development process but not a lot of direct focus and activity on it. KM happened more by chance and very occasionally was deliberately, captured, coded and distributed. Limited controlled updating and renewal of information occurred, and this was an issue with multiple versions and copies of the same material. Unfortunately, the lack of version control was an ongoing problem.

Knowledge and value to the organization

By default, induction and training documentation (peer reviewed) has been a primary source of renewing information and knowledge. Through the updating of training material, the firm indirectly updated content and knowledge. Other than this, *ad hoc* approaches, generally staff accidentally "coming across stuff they know or think will be useful", were common practice. It was "often very difficult to find the latest information" and resulted from inaccurate/out-of-date information and knowledge being used many times. The informal channels included *Toolbox – a morning tea/coffee break team/group focused project-based conversation*. The practices did suggest a strong source of socialization and renewal but not everyone hears and sees it or was invited, and these interactions were not recorded and/or documented. Conferences and CoPs were felt to be useful, but they were infrequent because of geographical, time, transient worker and costs issues. Knowledge renewal was largely a just-in-time approach. Explicit (corporate documents, presentations, procedures, industry and research reports) was understood as different from tacit knowledge (undocumented "how and why to do something" and "how to adapt" expertise); however, there was little time and effort/priority issue to get people to document the information. The project teams were largely volunteers, not IT experienced and often did not use IT on project sites. Remote access technologies and working environments were problematic in the past and had lost investment to improve/upgrade them.

This firm had recently established a national "Xchange" initiative to share documents – but this tended to be technical documents and some staff and volunteers were concerned

about negative feedback that had occurred in the past regarding quality in content. Comments included "It is not well managed, in fact it is more a storage process than any sort of collaborative workspace" and "removing identifiers would help to reduce the professional jealousies and inter-state rivalries that exist". This reflected the organization's immaturity and some scientific arrogance. The intranet generally had content management issues, with some areas more dynamic than others and project teams had access issues.

There were substantial IT issues, with IT requiring a substantial investment and upgrade. Leadership was limited and needed someone to take the lead on "topical issues" of current interest and to promote the need and value to attend. Interestingly, new staff were more aware of KM and have been helpful in requesting "How to/Why?" information and knowledge be distributed.

Organizational culture and internal marketing

Inter-state biases within the federated corporate structure were evident, and funding competition between states undermined collaboration. They had a strongly shared mission about "changing landscapes" to reduce the barriers; however, the barriers were more personally related to individuals in power positions than to structural constraints. The KM tools had a basic "lack of and understanding of what is really needed by whom and where", and this was seen to be a real issue. The two elements of people and knowledge were acknowledged to coexist. Using a mandated/corporate-style approach involving performance appraisals was suggested to "not work" by staff. It was suggested that many people "worked for the mission and personal satisfaction, not the salaries". With that goes a certain acceptance by everyone that a "dictatorial" approach also did not work and would not be acceptable to many staff and volunteers. Some states were more "commercially" focused (selling training courses, plants and consultancies to raise funds to support local requirements and projects), but the link between gaining funds and using it for KM activities was not evident.

The current culture was not well accepting of praise and/or promotion of individuals or groups. It tended to be more critical/analytical – *in a scientific review/examination manner*. Hence, many people have been reluctant to participate based on previous experiences:

> We do not promote our successes that well-Scientists do not tend to do that. Similarly, the field workers are a very egalitarian group. We do occasionally note the effort related to a project but it's more project-outcome oriented.

IT support and KM activities

The case had decentralized and off-site IT support, on an on-call, part-time basis, so it was very reactive to the needs and wants of the staff. Managers tended to drive the IT strategy; however, the IT was basic and only included personal computers (PCs), laptops and mobile phones and the remote access was inefficient with problems noted by staff. There was no suggestion that other tools such as digital recorders, tablet PCs such as iPads and Wikis had been tested or would offer any compensation to the access issues. Information management and shared drive or file system controls were not good. Poor information management practices meant there were multiple versions of documents, poor naming protocols and duplication of documents. The case firm ended up with "huge volumes of stuff which was hard to navigate".

KM strategy and organizational maturity

Financial and human resource constraints were the primary considerations for the implementation or lack of a KM system. Making the tangible/understandable link to "Projects of Natural Significance" (a high-profile conservation programme) was seen as important within this firm and showed some level of corporate maturity. Staff understood this prioritization, and it addressed the important *Why*? elements of KM within the firm which was missing in other projects and information captured.

Map analysis for Case 1

Figure 1 shows the Leximancer map for Case 1. The textual material included all the interview scripts and relevant documentation. The map denotes nodes, with the more central the node, the greater the hierarchy. *Knowledge* is the central node that is heavily reliant on scientific information and knowledge. The interesting finding is *Knowledge* and it has a strong relationship to the *social*. It is evident that knowledge is essential for both organizational operation and the environmental practices that are the key social mission of this NFP. *Marketing*, *Knowledge*, *Work* and *Social* are key nodes highlighted in the map and are closely aligned with the need to market knowledge throughout the channel is the form of internal promotion. The need for direction and formal guidelines to KM is evident in the global node of *Key and Practices*. There is further evidence that theses global nodes lead to the *Work and Social* pathway nodes, constructing the relationships of KM in enhancing and managing work and the social mission. This is depicted by the *Key*, *Important Practices and Knowledge* nodes sharing direct pathways. The global node of *Social* is directly related to knowledge, with the *Organization* node indirectly related to knowledge through marketing and issues. This suggested that knowledge captured from organization and issues such as managing negative workplace problems and issues are not perceived as such as knowledge unless they affect the market and marketing. Further analysing this node, IM and internal communication as mentioned were reinforced, with the notion of organizational issues' management being supported by IM. The node of *intranet* introduces the concept of technology and the role of the internal network for dealing with organizational operational issues. This is evident by the pathways to issues and reports. The node, however, is not directly linked to information, suggesting that it is not currently used with search, capture storage and diffusion of information. *Information* is, however, directly related to *Knowledge*. This suggests that *Reports* and *Issues* are stored on the intranet but *Information*, *Practices* and *Knowledge*, important to the social mission, are not. This suggests that employees see operational practice in an NFP as distinctly different to achieving the social mission.

In sum, Case 1 found a difference between operational knowledge and social mission (knowledge). It introduced that workers found mission knowledge more valuable and important with operational knowledge not. The concept of IM and internal issues management through marketing was also introduced. It introduced the intranet and technology for storage of reports and issues.

Case 2: homelessness services

The following section offers the description and context of Case 2. It offers facts about the operation of the organization and the explicit facts identified by documents and interviews.

Case 2 is an autonomous city-based NFP organization focused on feeding the homeless and visiting the homeless precincts to provide support such as crisis intervention, conflict resolution, first aid, direct counselling and welfare assistance/guidance. Case 2 works in

Figure 1 Case 1 thematic map
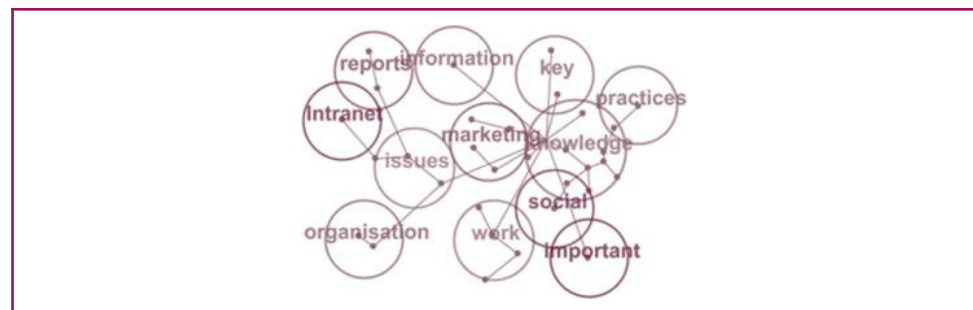
partnership with key services such as police, ambulance, local government, security firms and taxi services/operations. This service is *saving lives, improving life quality and making the streets a safer place for all.*

Case 2 includes a voluntary network of a city-based school community and support groups who operate from the school canteen and coordinate and distribute donated food items and welfare services around the central business district fringe. Case 2 represents a lot of the Australian NFP SMEs that are a voluntary network of autonomous community organizations that offer a range of services and come together with a common purpose and mission. One of the key functions is to operate and manage the community service website. It has been constructed for ease of use by anyone needing to know the when, where, what and who of this service and has been designed with users, providers, welfare agencies, public organizations and the general public in mind. This website can be used as tool to promote the services of each of the providers who have given their information, to attract volunteers and to attract funding support. The goal of Case 2 is to provide a "one-stop shop" that links safety, food and service provision to the homeless and needy in a simple and effective method. The case documents examined included communications reports, monthly meeting documents, district reports, calendars, intranet documents and shared open folders.

"Knowledge" in the organization: the distinction between information and knowledge

Case 2 is very low on the maturity scale and does not formally define information and knowledge. It could be titled *accidental knowledge*. The majority of people including volunteers, substantive staff and coordinators are not focused on capturing knowledge and are very task oriented. The information recorded is for the purpose of allocation and procurement or donations and supplies. The majority of the staff includes volunteers and are engaged to complete their shift or associated charity activities. Their primary objective is contribution to the mission. The staff sees knowledge as both explicit and tacit; however, they do not refer to knowledge in these terms and appear to have little insight into KM practices. Some understand the need to keep records and document frequent and repetitive incidents; however, the recordkeeping is a simple system with recording information *ad hoc* and information rarely documented and stored. The awareness of information collation as part of knowledge creation is limited. The information about networks, volunteers and donations is stored with and recalled by, the coordinating long-term volunteers and sponsors. KM and knowledge capture are suggested to be very resource- and time-constrained and "something to worry about another time".

Knowledge collection, co-ordination and distribution knowledge

The organization's website plays a major role in the collection, storage and dissemination of information to the various publics. There is an Internet (push and pull), e-mail, weekly newsletter to the various stakeholders that discusses supply/procurement requirements, activities/projects and future events. These are kept and stored unsystematically, and no planning or active data are extracted from these. Moreover, there is no follow-up and re-codification and update to put into a more work-friendly or usable format. There is a strong opportunity to identify KM needs/trends from communications to the organization via e-mail/phone, with partners (police, ambulance, etc.) and periodic incident reports and client feedback; however, this is not viewed as a priority or as an activity that would realize change.

An enquiry telephone service is operational, and this is staffed by the volunteers and school employees. This channel could provide substantial information about needs for scheduling, donations and services; however, this content is not formally captured, analysed and coded. Phone support staff also receive no training and a"learn on the job" practice is operational. No IM exists; however, there is a suggestion that "[. . .] there is a high social framework with strong informal networks" operational and this is the cornerstone of the

organization. "We are confident that the stuff we provide does help but we don't leverage that enough to improve and grow in what we do". In summary, it is evident the firm functions using a low-level socialization model and has low corporate maturity.

Knowledge and value to the organization

It followed that when knowledge capture is limited, renewal is also limited which undermines the ability for KM to have organizational impact and add value. Whilst there was no specific recognition or rejection of the value of KM, there was some mention that the idea of KM was very low in operational priority even if it could offer value:

> It's [information collection] is very ad hoc. We do not do any knowledge mapping to understand what is being done in detail, who actually uses it, where and how. We search through material and rely on memory which is not the most efficient method [. . .] it is easier for us [. . .] we are very resource constrained and largely volunteers. If we had extra resources we would not be spending it on KM, it would be on supplies or more people even if it could help us. That's the reality in many charities.

It was generally accepted that there was valuable knowledge in people's heads; yet, it was not in any formally documented and easily accessible form. It was valued that without some long-term staff and their networks, much of the work in the charity would "grind to a halt". *One* substantive full-timer suggested:

> Our management approaches require various levels of information capture which should and could be analysed but at this point we are not using any formal process in a structured way. Lessons Learnt and ideas for innovation are often shared in an informal way over a coffee [for example] but it does not lead to any operational improvement in any formal way that I've seen.

> Knowledge in the form of storytelling and debriefing is shared but we do not document and capture it, it is more to debrief and fight another day. We should write a journal or design a post-shift feedback document or something I guess.

There was no doubt that the full-time staff included educated, talented employees. Time and resource constraints appeared to be a major obstacle to the implementation of any KM strategy.

Organizational culture and internal marketing

Culture is very important to Case 2, where the mission and its volunteers are highly aligned:

> We are a sharing organization and very inclusive. Part of the fabric of the organization is our social natures and shared vision. Power plays, job status are not generally part of the fabric of this organization. I don't think it could afford it, particularly dealing with homelessness.

It is evident in Case 2 that people did not prioritize or rank highly the fundamentals and value of KM. This was not because they did not see value in KM but more because other functions within the firm were seen as more important to the delivery and practice in this time- and resource-contained environment. Consequently, operational knowledge was not captured and shared for future planning and/or performance improvement. Interestingly, this case operates in a "growing customer market" which seems to justify the continued focus on daily operational activity albeit that KM could add substantial value in servicing the growing demand and creating efficient systems.

IT support and KM activities

IT in this case is very simple with office-based PCs and email. Little or no information management strategy is apparent, apart from functional groupings around administration, finance and operations:

> It is an office admin and communication tool and is not seen as key to frontline service delivery which where we focus. It is probably a bit narrow minded but not many homeless people use email and the Internet but that stereotype is changing. Our sponsors, volunteers, and suppliers do use computers actively which is why we probably need to rethink our approach to IT and our website.

KM strategy and organizational maturity

Case 2 has low organizational maturity and identifies that this is one of the first discussions about knowledge and the need for capture. The organization has issues with staff and volunteer retention and suffers from a day-to-day management approach. The organization has adopted a Keep It Simple principle to build momentum maturity and capability and is aiming to start documenting some simple practices and growing as it improves in efficiency.

Figure 2 shows the map for Case 2. Similarly, *Knowledge* is the central node heavily reliant on a complex series of dispersed nodes. It is evident from the case transcripts that knowledge is essential for the firm practices; however, the key mission of this NFP and the delivery of services are more important. The nodes of *Social and Marketing* represent the friendly, social mission focus and social culture of this NFP. *Information* has a direct relationship to knowledge similar to Case 1 with *Reports*, *Organization* and *Issues* again indirectly related to *Knowledge* through *Marketing*.

The interesting new node is this case is *Strategy*, with this being reflective of the organizational maturity of the organization. The need for strategy integration, awareness and formal guidelines to KM is evident. Information and reports representing KM is not positioned as a priority when compare to the delivery of the primary services and mission represented by social, practices and work similar to Case 1. However, there is recognition that better capture, storage and retrieval would streamline operations and improve delivery through the *Practices* node. The *Organization* node represents operations, planning and delivery. The distance from the global node of knowledge does suggest that the link between KM and improved function is in its early stages and this notion is strongly supported by the case data. Finally, the *Work* node includes the concepts of employees and IT and represents the reliance on the full-time staff to capture knowledge. There is a high turnover of volunteer staff resulting in very low efficiency and low maturity in the KM process.

The proximity and overlap of global nodes of *Social* and *Knowledge* suggest that knowledge capture and management are embedded in a social construct and that a socialization strategy and use of informal social networks are essential for the knowledge function and performance of this organization and the realization of the social mission.

In sum, irrespective of the fact that Case 2 is of a lower organizational maturity, the issues related to social mission (knowledge) are seen as prominent with organizational knowledge indirectly related to knowledge through marketing. This case supports the role of social practices to enhance knowledge and IM practices to manage organizational issues and communicate reports (Figure 3).

Figure 2 Case 2 thematic map
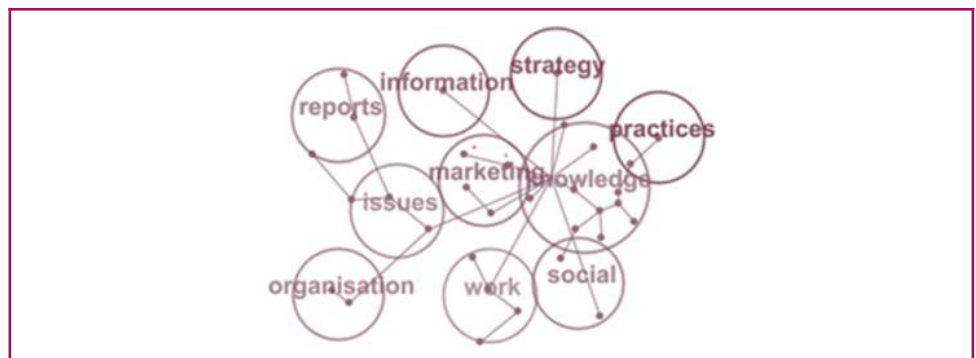
Bearing in mind the limitations in terms of transferability from case studies, the comparison of the two case studies' Leximancer maps highlighted similar strong relationships between social knowledge, socialization, social mission, work practices and IM.

These relationships highlight the opportunity for NFP SMEs, which are resource constrained, to develop more opportunities for cost-effective work-based socialization activities (such as regular team meetings, pre-work shift briefings, *Show and Tell* information sessions, work shift/project debriefs and summary reports) in which to capture, promote and share information and knowledge in a more formalized manner which will ultimately make it easier to distribute and renew in the future in a similar "amplification" cycle as envisaged by Nonaka and Takeuchi (1995). These work-based socialization activities leverage the inherent strong mission culture of NFP volunteers and staff to work with "like-minded" people (Table I).

Discussion

This paper has shown how the drivers for knowledge seem to vary across NFP SMEs, and the activities involved around supporting it, both explicit and indirect, are also increasingly varied. Haggie and Kingston (2003) suggested this in their work, and the application to small NFP organizations confirms this notion. This research has identified that the key elements of the KM framework in NFP SMEs are:

■ the adoption of simple social practices capitalizing on the informal and social network often evident in NFP SMEs;

■ the importance of the social mission to employees and its impact on knowledge definition and the need to embed this shared value in any KM strategy;

■ the importance of IM in sharing, capturing and documenting information and knowledge; and

■ the promotion of simple KM strategies as a method of efficiency, cost-saving and best practice that can assist in achieving shared goals and the mission in a cost-effective manner.

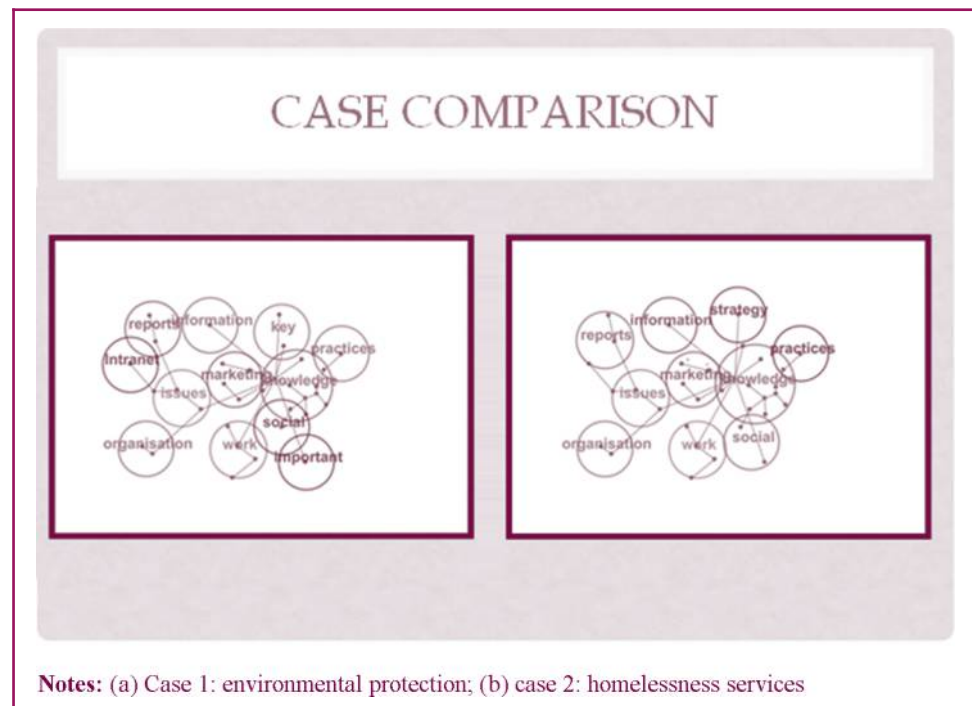**Figure 3** Comparison of case thematic maps

Notes: (a) Case 1: environmental protection; (b) case 2: homelessness services

Table I	Summary of the map constructs	
Constructs	Case 1: Environmental protection	Case 2: Homelessness services
Knowledge	Recognition of information and knowledge distinction but perceived resourced constrained in ability to do KM. Recognition of tacit and explicit forms of knowledge	Limited formal recognition of knowledge forms. Very task oriented but recognized need for improve knowledge capture and distribution to support in the field service delivery
Social	Strong recognition of the role of socialization in distributing and renewing knowledge	Increasing recognition of the value of "sharing" information and ideas to support service delivery and service improvements
Practices	Strong recognition of the need for formalized KM work practices	Very limited knowledge of how to develop KM work practices into work environment and organization
Work	Strong recognition of the value of KM for work that has a "scientific" context where knowledge is valued and used	Growing recognition of the value of KM to work but identifying "what is knowledge in the organization?" was undefined and only just emerging
Organization	Growing recognition that KM strategy required stronger organizational support in terms of a management structure with defined roles and responsibilities and processes around supporting KM activities	A very informal operational structure meant no formally defined responsibilities beyond "getting the job at hand done" to deliver the NFP mission. High volunteer turnover made Human resource management a significant challenge. KM was not seen to be inherent with a management structure but something that occurred on an ad hoc basis via work and limited socialization. Whilst valued, knowledge capture and renewal was weak and opportunistic at best
Internal Marketing	The role and value of IM to support KM activity was supported. The linkage to socialization was understood and the need to increase socialization opportunities and more formal practices around it to support KM	The role and value of IM to support KM activity was supported but not well understood
Issues	Widespread acknowledgement of the many organizational issues that hindered KM (but limited solutions offered)	General consensus that KM could assist but not an investment and/or resource priority in the organization. Commonly held belief that it was "too hard" and distracting from the core social mission and service provision
Information	The distinction between information and knowledge was understood and a recognized "gap" that required more effort/focus from the organization. Social knowledge/mission was the priority	Little or no distinction between information and knowledge. Little effort made around basic information capture and very basic content management efforts. Social knowledge/mission was the priority
Strategy	Strong recognition that effective KM required an agreed strategy and organizational support and effort to implement and sustain	Limited understanding of KM strategy and its role in the organization although some responses indicated that service improvement required more organizational investment which included leveraging internal knowledge of staff and supporters which did exist among "experienced volunteers"
Reports	Strong recognition of the value of distributing knowledge with the organization's staff and volunteers in a documented form via multiple channels	Recognition that distributing information to volunteers and staff was important to service quality
Intranet	Strong recognition that internal (on-line)channels such as Intranets, which were commonly used as a corporate repository and "memory", could be better managed to support KM	The use of a dedicated/formal channel for distribution of organizational information and knowledge was recognized as potentially valuable

The KM processes should not be complex approaches but should leverage off the informal relationships, basic IT tools and network connectivity and the shared values of many of the volunteers and permanent staff. The case analysis further defined this framework with a view to providing a "roadmap" for KM implementation in smaller NFP organizations. Most notable from the framework at this developmental stage is the recognition that "one KM programme does not fit all", but the core elements of knowledge identification, capture, documentation, socialization, leadership and leveraging basic IT are similar. Each NFP domain requires a customized approach taking into account their characteristic business models, social mission, internal structures, staff mix and operational capability-maturity.

As previously mentioned, a small NFP has been defined as locally based and with membership up to 50 people (European Commission, 2008). Specific attributes of small NFP organizations seen in this study include both explicit and tacit forms of knowledge and with this category, unstructured. Much of this knowledge is located on staff's computer hard drives and contained in employee's formal and informal "filing systems". Moreover, formalized knowledge creation, categorization and diffusion processes are unrecognized, and, as a result, KM is largely opportunistic and very informal. Small NFP organizations seem to have inherent processes and structural immaturity supporting the propositions of Lettieri et al. (2004), and size constraints presents an opportunistic environment in which to implement rudimentary KM practices such as socialization strategies using expert circles/ communities of practice/competency teams. Interestingly, much of these findings support the work in SME firms, with the focus on social mission and mission-related information and knowledge being the most notable and advanced. Desouza and Awazu (2006) suggested that knowledge in SME adopted an accidental approach, which is also seen in the NFP organizations (Ragsdell et al., 2014).

For social entrepreneurs, the social mission is overt and fundamental to their decisions (Dees et al., 2002). Social entrepreneurs have a more holistic sense of value than economic value and can tend to react slowly to operational innovations unless the holistic value measure is satisfied (Kong, 2007; Brown and Ferris, 2007). Unlike a business entrepreneur, the threat of failure is not as ominous (Dees et al., 2002); so, laggard change to innovation is evident (Dees et al., 2002). Moreover, the costs and time associated with the recruitment of KM personnel (knowledge champions), KM process and IT infrastructure could work as a deterrent to the adoption of implementation of the programme, further hindering the success and support for KM in NFP organizations.

Nonaka and Takeuchi (1995) suggest that knowledge is "amplified" through the four modes of knowledge: socialization, internalization, externalization and combination. For first-time adopters like these NFP SMEs, engaging the users through socialization is essential for the early capture of knowledge. Simple practices using pre- and post-shift team briefings and regular all-staff meetings (formal and informal) will commence this process. Where knowledge, particularly tacit-oriented technical knowledge, is typically stored with the full-time staff and/or long-serving volunteers who, in these small NFP organizations, are frequently time poor and multi-skilling, the request to document knowledge becomes neglected.

Adopting social network and informal communication exchanges between full-time and volunteer staff allows these staff to share knowledge in a more relaxed and direct environment.

Often knowledge sharing is also met with significant passive and active resistance (Blair, 2002; Politis, 2003). This can be related to job security and status or a lack of trust and experience. The transient and volunteer worker share these traits and, as a result, a more non-threatening and personalized approach (Nonaka and Takeuchi, 1995) is used in which the identified knowledge creators are initially "socialized" with designated personnel, both known Subject Matter Experts and their associates, to share experiences and interpretations within their "home" territory as an informal and preliminary. This practice is reflective of the "CoP" suggested by Wenger and Snyder (2000). This process is recommended to offer some successful outcomes for these smaller NFP organizations; however, it should be acknowledged it will take time to build critically needed trust between the relevant parties/stakeholders, gain momentum and popularity.

Politis (2003) posits that inter-personnel trust is a key element in the acquisition and sharing of knowledge in work teams. On-going trust building to "obligation/commitment" is seen as critical to maintaining momentum and renewal of the KM programme (Ballantyne, 2000). Most importantly, the focus on the people in the socialization phase and creating forums, events, activities in which to foster engagement and dialogue is paramount. However easy

the process of socialization in KM may seem, it is fraught with difficulties because of the large numbers of voluntary staff number and *ad hoc* attendance in small NFP organizations. Further, identifying and qualifying who and where the Subject Matter Experts are located and then meeting in one destination with interested users at the same time can be extremely difficult.

Irrespective of the type of KM strategies implemented, many factors are proposed that contribute to both KM successes and failures in small NFP organizations. KM literature consistently highlights cultural factors, at multiple levels, as the biggest barrier to getting engagement and support for KM (Choy and Suk, 2005; Chua and Lam, 2005; Malhotra, 2004; Riege, 2005), and this research supports that assumption. These cases reflect that, in smaller NFP organizations, culture plays a significant role in knowledge capture and storage. Case 1 showed a deeper sense of understanding of KM; however, their organizational cultures made sharing difficult. Case 2 was smaller and operationally immature, had friendly and social cultures, but their leadership, capability and structure were significant impediments.

Further to the previous cultural issues, the leadership style and governance issues within the organizations represent another milestone in KM implementation in these smaller firms. In these small organizations, if the CEO/General Manager was engaged with the knowledge process, they would help drive adoption of KM. Research evidence in KM suggests that a combination of many leadership styles (transformational, transactional and charismatic, for example) are required for KM competence (Hall, 2003). Oliver and Kandadi (2006) summarize these leadership traits as "evangelization". In driving, sustaining and supporting KM practices, case study evidence strongly supports this claim (Choy and Suk, 2005) and is reflected in this study. Case 1 had a stronger leadership structure that supported knowledge, albeit on somewhat *ad hoc* basis.

KM research has supported the leadership paradigm and must include both the executive levels of the organization and the functional and middle management levels. KM champions must also be evident at every level and/or functional area to motivate, reaffirm and, most importantly, model desired behaviours for KM programme implementation and support implementation, confusion and/or fatigue (Jones *et al.*, 2003). In these smaller NFP organizations, these champions need to include both permanent and/or experienced volunteer staff. It was evident in the cases that the many volunteer staff contributed significantly within these firms and could provide an important source of knowledge.

The impact of these basic practices, however, will be somewhat limited due to the ability to distribute required knowledge on demand (via online/mobile channels) to other non-attending members (when and where it is needed). Consequently, alternative knowledge distribution strategies are required to distribute the knowledge such as the use of "mentoring" which can provide an on-demand supply, albeit somewhat reactive. However, small NFP organizations as noted tend to be characterized by transient volunteer staff and social entrepreneurs and developing communities of practice and mentoring strategies can be spasmodic reflecting the staff stability and incumbent managers' management style. As a consequence, the continued amplification of knowledge from socialization and internalization (learning at work) strategies to externalization (documentation) and combination (ongoing development via the knowledge cycle) will consequently struggle, being piecemeal and *ad hoc* in small NFP organizations. Accordingly, small-sized NFP organizations should focus on socialization and engagement of the transient worker and internalization strategies via small and insular communities of practice. Mentoring activities are less important until such a time as the organization can stabilize its workforce and mature and develop its leadership. Embedding fit for purpose focused, processes around information and knowledge capture, documentation, distribution and knowledge renewal would be beneficial.

Summary

This paper has shown how the drivers for knowledge seem to vary across SMEs and NFP organizations, and the activities involved around supporting it, both explicit and indirect, are also increasingly varied. This research has identified several key elements of the KM framework in NFP SMEs. The first suggests the adoption of simple social practices capitalizing on the informal and social network often evident in NFP SMEs that capture the importance of the social mission to employees and its impact on knowledge definition. The research suggests the need to embed this shared value in any KM strategy. The paper also emphasized the importance of IM in sharing, capturing and documenting information and knowledge. The paper finally suggests the promotion of simple KM strategies as a method of efficiency, cost saving and best practices that can assist in achieving shared goals and the mission in a cost-effective manner.

Practitioners and researchers alike will benefit from the knowledge gained in this research as it commences the discourse in the NFP SME segment. This segment of firms is often overlooked in research with operational practice and efficiency a dream rather than a reality. Focusing KM to ensure that informal networks and employees interest in the social mission is considered will advance KM acceptance as a component of achieving social mission and goals and organizational effectiveness. Continued research in this space will assist in developing relevant strategies to move forward.

This study has aimed to access all empirical articles in the field of KM in NFP SMEs. Articles from 2005 onwards were accessed to capture the advancement in wireless, mobile computing technology and smartphones as KM support. This has limited the role of earlier works in the research. This work is exploratory work and its empirical value is limited by this. It is arguable that the sample cases may not offer a comprehensive coverage of all NFP SMEs, with the qualitative approach further limiting the generalization of the findings. Further research could recruit more diversified NFP organizations and or conduct a comparison study with a larger sample of the same type of NFP organizations, same level of organizational maturity and similar social mission. Because of the rudimentary research in this area, future research could develop and test specific socialization practices in NFP organizations and SMEs, advance the role of IT and investigate the role of transient and volunteer employees in KM in NFP organizations.

Conclusion

This research has expanded the KM research paradigm away from a strong focus on understanding the concept of "what is knowledge" in for-profit firms. It has emphasized various attributes and formalized different taxonomies to a much-needed pragmatic research programme on the "how" NFP SMEs manage knowledge from a process- and people-oriented view. This paper has contributed to advancing what organizational functions are required for better adoption and implementation of KM in the NFP sector. By developing the priorities in implementing and operating KM programmes such as social mission, this work is helping managers and SME organizations recognize that knowledge (both tacit and explicit) is primarily created by people within the organization and at the level that requires specific social and IM practices to help focus activity, capture and distribute knowledge. This paper suggests that for the sharing process to begin, mature and sustain itself, understanding and managing the primary psychological elements of socialization, values and sharing is vital. This paper introduces the practice of IM and socialization as the essential ingredient for KM success in NFP SMEs. It is essential for "knowledge to be viewed as a "product/service" within the organization that is marketed to facilitate exchange both within the organizations and with customers/clients. Linking KM and IM to address the personal issues of "me", i.e. the transient, volunteer and full- and part-time worker, is key to supporting knowledge capture and ongoing renewal that is central to KM. As part of this IM process, knowledge contributors, developers and process champions need to be actively engaged, motivated and rewarded and/or recognized within the organization in some meaningful way to continue to contribute.

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