

# Driving Up the Value of Internal Information

The Ipas Information Audit

Spring 2008

# Ipas

Ipas has experienced rapid growth in the last 10 years:

From 30 staff in the US to currently 220 staff world wide.

- Staff is evenly split US/overseas
- We have a number of telecommuting staff in the US - including our Medical Director

# Barriers to KM

- Move from small to medium size organization
- IT staffing and infrastructure
- Lack of staff time
- Language, time zones, culture

# What We Have Going For Us Now

- Integration of IT and IS units (ITR)
  - Great set of skills within the ITR staff, good working relationships
- High level organizational support
  - Increased organizational resources

# Systems in Place

- Existing SharePoint intranet – Luna
- New finance system - BlackBaud
- New planning database –Plan-It
- Contacts database -poor
- GEM -training activities
- MAS – MVA and publication sales

# Ipas Information Audit

Concerns about information needs and uses were swirling around the organization

- Needed to collect and analyze
- Needed to develop a strategic plan
- Started searching the literature, and talking to colleagues
- Heard about information audits

Orna, Elizabeth. Information Strategy and Practice. Aldershot, UK: Gower Publishing, 2004.

- Practical, step-by-step process
- Easily adapted
- Writing a bit dense but has little jargon



# Goals of Audit

- Quick wins
- Ideas to support Luna redesign
- Long-term needs



# What Should Be

- What does the organization need to accomplish its mission
- Examined strategic objectives as outlined in the Ipas Vision document
- Looked at activities described in planning database
- Created a table with findings

# Staff Audit Sessions

- Worked with a consultant to adapt the Orna workshop model
- Held series of facilitated two-hour meetings and three additional Elluminate sessions
- Tried to reach all staff – great response
- 68 staff attended (1 India, 2 telecommuters)

# Worksheets

- Staff filled out a worksheet during the sessions
- Asked for best practices and gaps
- The workshop discussion helped staff add more notes to worksheet
- We are using those sheets to analyze the existing info situation
- First interim report is in process

# 1. Knowledge and Information Needs

List the essential information that you need to do your work. Are your needs being met?

## 2. Knowledge and Information Sources:

Name the essential information sources you use to get information to do your job (*these could be paper, electronic, or kinds of people*). Add comments about your ability to access them.

### 3. Information Processes and Products:

- a. How does your unit manage information? Is there a person responsible for this? If so, who?
- b. How effective is information exchange within and between units, and between country offices?
- c. What kind of information do you provide, as a part of your work, to your unit, to others at Ipas, and externally?

## 4. Information Environment at Ipas:

What are the technology tools you use in handling information? Give comments about barriers and best practices.

## 5. Reflections:

Please give suggestions that would help you make more effective use of knowledge and information (use back if needed).

\* This is where we got some great ideas and feedback!



# Preliminary Findings

- The process gave us data in all the desired areas: quick wins, Luna redesign, and big projects.
- We also obtained information on
  - Training needs (we can address)
  - Management issues (we can only report, not address)

# Next Steps: Individual Interviews

- The next step is to have meetings with individuals identified as major stakeholders regarding:
  - Database development/maintenance
  - Information creation
  - Special information needs
  - Policy makers
  - Staff members who have requested individual interviews

# Next Steps:

## Visits to Country Offices

- Had good results at headquarters, but that is only half of the picture
- Online options (Elluminate) not sufficient, need face-to-face
- Country staff members have different needs and constraints
- Global IT initiative – IT to Ethiopia
- Julia to India in May
- Joint IT/IS trips planned for next FY

# To be continued...

- Just getting started
- Great staff interest in process
- Luna 2 will roll out in late summer
- List of big project issues is good tool for planning
- Generated good will by following through on 'quick wins'
- Training is going to be a BIG Deal