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BIRD OR SUITCASE?
TWO WAYS OF TRANSFERRING YOUR FM KNOWLEDGE

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When knowledge needs to be transferred from one place to another, for example from one department to another, most people experience that it is not easily done. In this article, I present two approaches to knowledge transfer useful to know.

My PhD research project, hosted by the Technical University of Denmark, Centre for Facilities Management, is about transferring FM knowledge to the design of new facilities. It is very attractive, yet very difficult, to make FM knowledge worthwhile in a different context. Therefore, I have looked at how other researchers within and outside the field of FM have described how knowledge can be transferred. A pattern of two different approaches appears. To make it more convenient, I simply call them "bird" and "suitcase".

The concept of knowledge

The bird and suitcase approaches differ from each other already in how they perceive the concept of knowledge. Those committed to the suitcase approach believe that knowledge is information delivered at the right time and place. The other approach, the bird people, considers knowledge more alive, 'flying' and existing among us. To them, knowledge also includes personal experiences, hunches and beliefs.

Both suitcase and bird people agree that there are two types of knowledge: explicit and tacit knowledge. Explicit knowledge is all the things we know, which we can easily describe and discuss. Sometimes, we have already written down this type of knowledge. On the contrary, tacit knowledge is all the knowledge we have - for now - only in our minds, more or less unconsciously.

What to do with your explicit and tacit knowledge

Though both the bird and the suitcase approach recognize that explicit and tacit knowledge exist, they do not agree on what we should do with tacit knowledge. The suitcase people recommend that we get it codified. This means getting it out of our minds and making it accessible to others, for example in tables, drawings or text, often with the assistance of IT tools. They propose linear knowledge transfer models, starting at a sender, ending at a receiver. The first step is typically an alignment of the documentation (the now explicit knowledge) to ensure that the receiver, even being far away from the sender, can easily understand the knowledge. After aligning the documentation, it must be stored in a suitable 'suitcase', containing the knowledge until a receiver finds it valuable to unpack and apply the knowledge in a new context, such as a design for a new facility.

The suitcase approach

Looking at the current practice of knowledge transfer from FM to design, one finds many good suitcase initiatives. Examples are 'design standards' or detailed specifications of the future facility. This allows the building client and his or her FM organization to describe their demands for a new design, based on their experience. Other examples are FM checklists or data on energy consumption collected in buildings in operation. Databases or shared project web pages for document upload are examples of 'suitcases', containing explicit knowledge accessible on-demand to a recipient whenever relevant. Conversely, the completed building project delivers a lot of explicit knowledge in return to FM.

A BIM model is an example of a 'suitcase', containing explicit knowledge to be passed on from design to FM. The mantra of the suitcase approach is that by making knowledge detailed, structured and accessible, the recipient can apply explicit knowledge in a valuable way in a new context.

The bird approach

People committed to the bird approach are sceptical of the idea of codifying and transferring knowledge in the somewhat mechanical way the suitcase people suggest. They, the bird people, believe that it is not possible to make your tacit knowledge explicit, because knowledge is 'airy' and difficult to get a firm grip on (like a bird). Possible or not, the bird people also question the value of describing your knowledge in detailed tables and text for the purpose of knowledge transfer. They mention bicycling as a good example of the uselessness of the suitcase approach. Not even a richly detailed description of the art of bicycling will teach the recipient to ride a bike. The only way to learn how to ride a bike is by doing. One needs to be practicing with the bike, your body and your balancing skills - imitating others and with the support of a more experienced person.

Furthermore, the bird people reject the idea of storing knowledge in a suitcase, independent of the knowledgeable person. They stresses that those who aim to exchange knowledge must meet face to face. They need to spend time together. They must develop a relationship and a culture of sharing knowledge needs to be stablished. They should also both be able to see the value of sending and receiving knowledge. Actually, the bird people question the simplicity of a 'sender' and a 'receiver'. They argue that knowledge transfer processes includes change and development of the knowledge of both the sender and the receiver.

Design projects offer good examples of initiatives rooted in the bird approach. 'Shared project office' is an example, which is seen more and more. In the shared project office, the project participants, including the building client, the design team and the contractors, create a joint workplace. Workshops and kick-off days in new design projects are other examples. Some might even argue that the workshop dinner is the most important part of a workshop.

Use both

Few will confess completely and firmly to either the bird or the suitcase approach. And there's no need to do so, either. Instead, one can use the two approaches as a pair of glasses one puts on: Imagine that you are now a suitcase person; have you put enough effort in to codifying your tacit knowledge, storing it and making it accessible to others? Then try to look at it from a bird's point of view; have you made sure that the people, who need to exchange knowledge trust each other and that they make sense of the knowledge transferring? In other words, has your organization found the right balance between checklists and Friday's beer?

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