

**Charnwood Connect:  
A holistic knowledge management strategy for the voluntary sector<sup>1</sup>  
by  
Moya Hoult<sup>2</sup>, Gillian Ragsdell<sup>3</sup>, Peter Davey<sup>4</sup> and Paul Snape<sup>5</sup>**

### Introduction

Advice services play a valuable role in ensuring people are well-positioned to make informed choices and decisions that enhance their health and wellbeing. The public and voluntary sectors make an important contribution to the provision of these services. Over time, particular provision and specialist knowledge has become associated with specific agencies, and individuals have been able to access it accordingly. It has, however, become challenging for the demand to be met. Increasingly, individuals are accessing services at times of crisis, perhaps when they are at serious risk of becoming homelessness, on the edge of bankruptcy or while coping with escalating mental health issues. In addition, since crises are not neatly packaged, there is a growing need for individuals to draw on the knowledge of multiple agencies. So, there is a need to design a more efficient and effective way of ensuring that support is offered in a timely and joined up manner.

Charnwood Connect, funded for two years by the Big Lottery Advice Services Transitions Fund, was designed in response to changes in UK social welfare and housing policy. It aimed to encourage voluntary and public sector organisations to work together to achieve more for clients and service providers by adopting an integrated model of best practices in knowledge management. The project was led by Citizens Advice Charnwood and The Bridge (East Midlands); an additional eight advice agencies within the locality were included.

### A Holistic Approach

The project was underpinned by knowledge management principles with particular emphasis on successful knowledge sharing between the project participants as well as with their clients. A holistic approach was taken, with attention paid to both technical and social aspects. The former was primarily addressed by the development of an IT Knowledge Hub and the latter by the creation of The Forum. Given that project participants had previously been in competition for funding, a key challenge was to support the building of relationships and trust - over time, there was an increase in mutual awareness and respect about the work of different partners that accelerated improvements in collaboration and in achievement of the project aims.

Charnwood Connect's overarching aim of building resilience into advice provision across the locality was to be achieved by four distinct, but joined up, objectives. The development of a multi-faceted bespoke Knowledge Hub was a core objective of Charnwood Connect and is the focus of discussion herein. There were two distinct areas to the Knowledge Hub. One aspect was to support practitioners in terms of specialist learning, policy and procedural updates, and legislative updates – The Forum. The second aspect – the IT Knowledge Hub - was a client facing resource to include information on all available services within the locality, access to online advice and information resources, and information about referrals and signposting.

So, the Knowledge Hub appreciated both codification and personalisation strategies to knowledge management. It was a cornerstone to the project since it supported, both explicitly and implicitly, Charnwood Connect's other three objectives of:

1. Prevention, advice and specialist support - Charnwood Connect will offer an empowering service. The aim is to enable people to take control of their lives by offering advice, information and support on social welfare law.

---

<sup>1</sup> An extended account of this project can be found at Hoult, M., Ragsdell, G., Davey, P. and Snape, P. 2017, Charnwood Connect: Holistic knowledge management for building resilience in the voluntary sector, In Remenyi, D (ed) *Knowledge Management and Intellectual Capital Excellence Awards 2017: An Anthology of Case Histories*, ACPIL, pp.27-40, ISBN: 978-1-911218-50-0

<sup>2</sup> Formerly at Charnwood Citizens Advice Bureau

<sup>3</sup> School of Business and Economics, Loughborough University [g.ragsdell@lboro.ac.uk](mailto:g.ragsdell@lboro.ac.uk)

<sup>4</sup> The Bridge (East Midlands) [peter.davey@thebridge-eastmidlands.org.uk](mailto:peter.davey@thebridge-eastmidlands.org.uk)

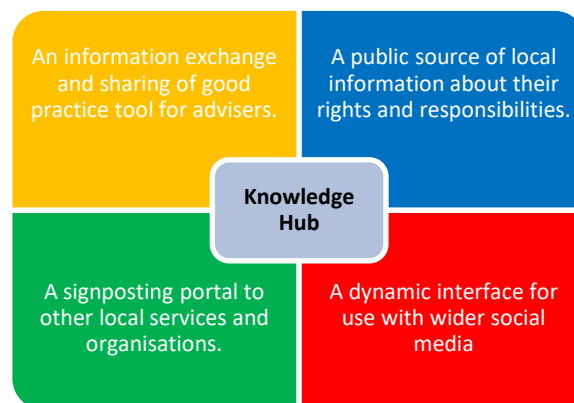
<sup>5</sup> The Bridge (East Midlands) [paul.snape@thebridge-eastmidlands.org.uk](mailto:paul.snape@thebridge-eastmidlands.org.uk)

2. Education, training and enabling - Charnwood Connect will offer a financial education training programme giving skills, knowledge and confidence to enable people to make informed decisions regarding the use and management of money.
3. Volunteering - Volunteering is an effective pathway to employment. Charnwood Connect will build upon and develop the successful volunteering model which is delivered by CAB. This will contribute to ensuring that Charnwood Connect can meet the ever increasing demands for frontline service delivery.

### The Knowledge Hub

The Knowledge Hub comprised of a technology-centred element – IT Knowledge Hub – that complemented a human centred element known as The Forum. In keeping with meeting the needs of as many stakeholders as possible, these elements were designed to serve both clients and practitioners; there was commitment to genuine participation from them in the design process.

The functions of the IT Knowledge Hub are shown in Figure 1. In addition to client involvement, out of necessity a specialist IT and web design organisation was commissioned to move the design concept into a practical tool. The ethos of the organisation aligned firmly with that of Charnwood Connect and this was a key consideration in the selection process.



**Figure 1:** Functions of the IT Knowledge Hub

Alongside the development of the IT element, The Forum was established at an early stage of the project with quarterly meetings taking place within the locality. It was a valuable platform for building communities of practice in which knowledge was shared and there was collaboration on issues of concern to clients. In the spirit of the cultivation of such groups, The Forum elected from amongst its number, a chair and vice chair, and agendas were agreed by the partners.

### Challenges

Charnwood Connect was an ambitious, cutting edge project; it was pioneering with respect to the processes it promoted – i.e. knowledge management practice - and with respect to the context of operationalisation – i.e. the voluntary sector. So, it was not surprising that a host of challenges were encountered, including:

- Effective partnership working
- External environment
- Internal environment
- Lack of joint vision/common bond
- Time resources
- Dedicated Leadership/Management
- Data sharing

Advice services provision is, without doubt, knowledge intensive yet, prior to Charnwood Connect, knowledge management was not overtly practised within any of the project partners. Rather, knowledge management was intuitive and implicit *within* partner organisations. Limited, if any, knowledge sharing was occurring *between* partners. While business models and theories are used in the management of voluntary sector

organisations, their origins may restrict the extent to which they can capture the purpose, charitable nature and ethos of organisations beyond those which are profit making – the holistic and critically reflective manner in which knowledge management principles were applied, negated this possibility in Charnwood Connect.

The context for this application of knowledge management and the cultural challenges that it brought were more difficult to manage. There were practical and conceptual obstacles. From a practical perspective, although the long term benefits of the project were appreciated by partners, it was inevitable that the day to day urgency to support clients in desperate need of help sometimes reduced their capacity to contribute to Charnwood Connect. This was the nature of the environment of the project. Additional practical challenges related to the complex particularities of client groups and the need to adhere to data sharing protocols; none of these challenges were insurmountable but they did consume resources in an unanticipated way.

Although there were other cultural differences between partners, the conceptual obstacles were largely borne out of the competitive nature of funding within the voluntary sector. Prior to Charnwood Connect most partners regularly entered the same competitive tendering processes; all required funding to secure core posts and there was a limited 'pot'. So, moving the mind-set of partners from one of competition to one of collaboration was a huge challenge, but was a necessary conceptual transformation for the success of the project.

### **Summary**

A host of evidence has been gathered to demonstrate Charnwood Connect's impact. The project is a case study of successful implementation of a knowledge management strategy in a sector with extreme operating conditions - uncertain resources, a transient (volunteer) work force, and clients who are often at crisis point. It was an ambitious project that was underpinned by a holistic model of knowledge management. There has been a plethora of learning outcomes from the project; not only for the individual partners, but also for the voluntary sector in Charnwood and beyond. The project leaves an important legacy and is increasingly recognised and promoted in discussions with funders, decision makers, including Members, and policy makers.