

Utilising External Evidence and Organisational Knowledge Self-Assessment Tool Guidance for LKS Teams

This tool has been designed for use by Boards of NHS organisations to enable them to:

- assess what is working well and what more could be done
- spot practical initiatives on which librarians and knowledge specialists can lead to help you meet your objectives
- set priorities for better mobilising evidence and organisational knowledge

The tool can also be used in a similar way with individual directorates, divisions and departments within an organisation.

The Role of the Librarian and Knowledge Specialist

The self-assessment can be discussed by the Board or individual Executive Directors independently but ideally a member of the Library and Knowledge Service team should facilitate the discussion, answer any questions that may arise and work with participants on setting priorities for further work.



If you are uncertain about taking this to your Board then why not start with a team, department or division within your organisation?

Preparation for the LKS facilitator

- Familiarise yourself with the tool and especially the list of opportunities in section four.
- Consider local examples of the opportunities that you can refer to.
- Identify who you will target to participate in the session.
- Schedule the session and time after the session to prepare the action plan.

Preparation for participants

- When the date is confirmed send the self-assessment to participants to read through in advance so they will have time to fully consider the criteria.



Allow 20 minutes to an hour for pre-reading.

At the meeting

- Briefly introduce the self-assessment re-iterating the purpose
- Score each criterion. Reading from left to right ask each participant to circle the appropriate level of maturity.



This works best if you let them read and respond with minimal input from you. Just try asking “what level have you put for...” They will be able to decide this and shouldn’t need a steer from you, but if asked for your opinion be prepared to give it.

Allow



15 – 30 minutes depending upon the level of discussion

- Prioritise opportunities. Use section four to prioritise the opportunities you will adopt for each section of the tool.
- Identify and agree actions that the library and knowledge service will take to address the issues raised in the self-assessment.



As the expert in the room, take ownership of this stage in the process and the next step of drawing up an action plan.



Allow 5 – 15 minutes for prioritisation or longer if each opportunity is explored in depth

Following the meeting

- Summarise the key outcomes from the session and thank participants for their input
- Prepare an action plan to exploit the opportunities prioritised
- Feed back to LKS colleagues in your region or nationally via the KfH Blog about the process
- Start to deliver your actions

If you would like to find out more about Board self-assessment tools and maturity models please take a look at the [KM Toolkit section on self-assessment and river diagrams](#). When you repeat the self-assessment, we would recommend after two years, you may wish to develop the concept further and adopt a full River and Stairs assessment.

Personal Action Card:
Implementation Plan for the Tool

Utilising external evidence and organisational knowledge: a self-assessment



Key Actions for Implementation:

- Have you identified the “opportunity” areas you need to find out more about?
- Who will you approach first about this in your organisation?
- Who else will you use the self-assessment tool with?
- When will you schedule facilitation of the self-assessment?
- Who else will you contact for further help should you need it?

Implementation tips

- Familiarise yourself with the self-assessment tool prior to arranging a facilitated session
- Remember you can use the tool with any senior staff group – perhaps practise on your local senior team before trying with the Executive Board
- Consider using local examples to illustrate the opportunities
- Remember that in the pilot the tool was received enthusiastically – this is of interest to executives
- Don’t be put off if the planned session gets postponed - persevere

This document should be used in conjunction with Version 1.0 Health Education England, 2017. Utilising external evidence and organisational knowledge: a self-assessment. Accessible from:

<http://kfh.libraryservices.nhs.uk/knowledge-management/meok-cascade-resources/>

©Health Education England, 2017