KNOWLEDGE MANAGEMENT: Transfer It Before It's Too Late!

By Patrick Ibarra, The Mejorando Group

As workforce members continue to depart organizations, with them goes a significant amount of critical knowledge that is essential to conducting the public's business within their former organization. But the challenge of finding replacements for those employees who leave is only part of the problem. Concentrating on staffing overlooks the real price organizations often pay when they lose highly skilled professionals and technicians to retirement or mid-career job changes. The knowledge these veterans take with them has immediate, though often hidden impacts on productivity. This lost knowledge can occur at a broad organizational/functional level or within a work unit/small group level, or both. So the problem for leaders is not just one of headcount and finding another body to fill the role—it is a matter of retaining or replacing the sophisticated, context-dependent knowledge that resides with the employee who is leaving.

The workplace culture influences all aspects of an organization's performance. But in this era of shifting workforce demographics, leaders must pay particular attention to their culture's effects on both employee and knowledge retention. Absolutely, retaining employees can help retain critical knowledge, but employee retention and knowledge retention is not the same thing. Some highly paternalistic cultures produce attrition rates that are actually too low by fostering an environment where most employees can and do stay with the organization long term, regardless of their performance. Low turnover, however, does not mean that knowledge is necessarily being retained and shared in critical areas.

As organizations prepare for the potential departure of valuable staff, a major concern is how to preserve the knowledge that these seasoned employees have amassed. In general, the growth in the

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volume of information available and rapid technological progress has forced most people into a state of information overload. This has left organizations scrambling to create systems for acquiring, retaining, and accessing an overwhelming volume of data. Added to this is the demand for highly specialized knowledge that is often difficult to find and retain. *Knowledge management* is one method for ensuring that years of accumulated wisdom do not leave the department once the employee(s) retires or moves on. The challenge is to create an atmosphere that encourages knowledge sharing, while simultaneously underscoring that transferring knowledge is a way for employees to leave a legacy that will ultimately help the organization long after they leave.

Knowledge management and transfer is a segment of an overall approach to succession planning, which is an ongoing process of systematically identifying, assessing and developing talent to ensure the leadership and management continuity for all key positions in your organization. It ensures that replacements have been prepared to fill key vacancies on short notice, that individuals have the development capacity to assume greater responsibility, and that individuals are prepared for exercising increased technical proficiency in their work.

Generally speaking, the term "knowledge management" (KM) represents a broad concept, and is thought of as a system for finding, understanding, and using knowledge to achieve organizational objectives. The three activities of finding, storing and retrieving are the "organizational memory" of the particular agency. It is more than simply moving or transferring files and data from one employee (or department) to another. KM allows others to build upon a person's professional experience within the context of the organization in a way that strengthens not only the employee, but the organization as a whole.

There are at least two types of knowledge: *Explicit* and *Tacit*. Explicit can be described as data and is often found in software systems or documents. On the other hand, tacit knowledge is includes cognitive skills such as beliefs, images, intuition and mental models as well as technical skills such as craft and know-how. Tactic knowledge is knowledge that people carry in their minds and is, therefore, difficult to access. Often, people are not aware of the knowledge they possess or how it can be valuable to others. Tacit knowledge is considered more valuable because it provides context for people, places, ideas, and experiences. Effective transfer of tacit knowledge generally requires extensive personal contact and trust.

Various types of knowledge retention strategies can be utilized so that critical knowledge does not "walk out the door." The goal of the knowledge retention process is to preserve knowledge assets, enabling the agency to:

- Minimize the risk and cost of lost knowledge.
- Increase the speed to competence of individuals assuming new responsibilities.
- Build internal bench strength, thereby increasing employee retention.
- Create knowledge and skill repositories that support creative job and learning design.
- Lower training costs through repurposing assets across various employee groups.

Knowledge is vastly different than data due to its subjective and contextual nature and essentially can be defined as "how things get done" inside an organization. Knowledge is obtained through a variety of experiences, typically over a period of time, and is the primary factor in exercising sound judgment and decision-making, two responsibilities often handled by executives. To capture and transfer knowledge requires a categorization system to identify the types of knowledge important to the organization.

Explicit knowledge can be preserved and transferred to other employees through the creation of procedural guides, desk manuals, or libraries of related documents. Some agencies have also developed transition planning forms that retiring employees complete before they leave. Such forms identify key documents and where they are located (e.g., shared computer drive), important dates during the year given the specific duties of the position, key players inside and outside the organization, needed skills and appropriate skills training, and professional support organizations. It is more difficult to capture tacit knowledge. Other approaches such as wikis, knowledge blogs, or other online archives of knowledge attempt to capture information, best practices, and stories (which are often the best way to learn). To further extract tacit knowledge, some agencies conduct in-depth and probing interviews of retiring interviews and post the videos of the interviews on their intranets. Identifying communities of knowledge across the organization or developing an "expert yellow pages" can assist newly promoted employees. Organizations can also bring back retired professionals to assist their replacements.

There are a number of proven ways for organizations to identify, store, and transfer knowledge. Relying on an overall strategy and

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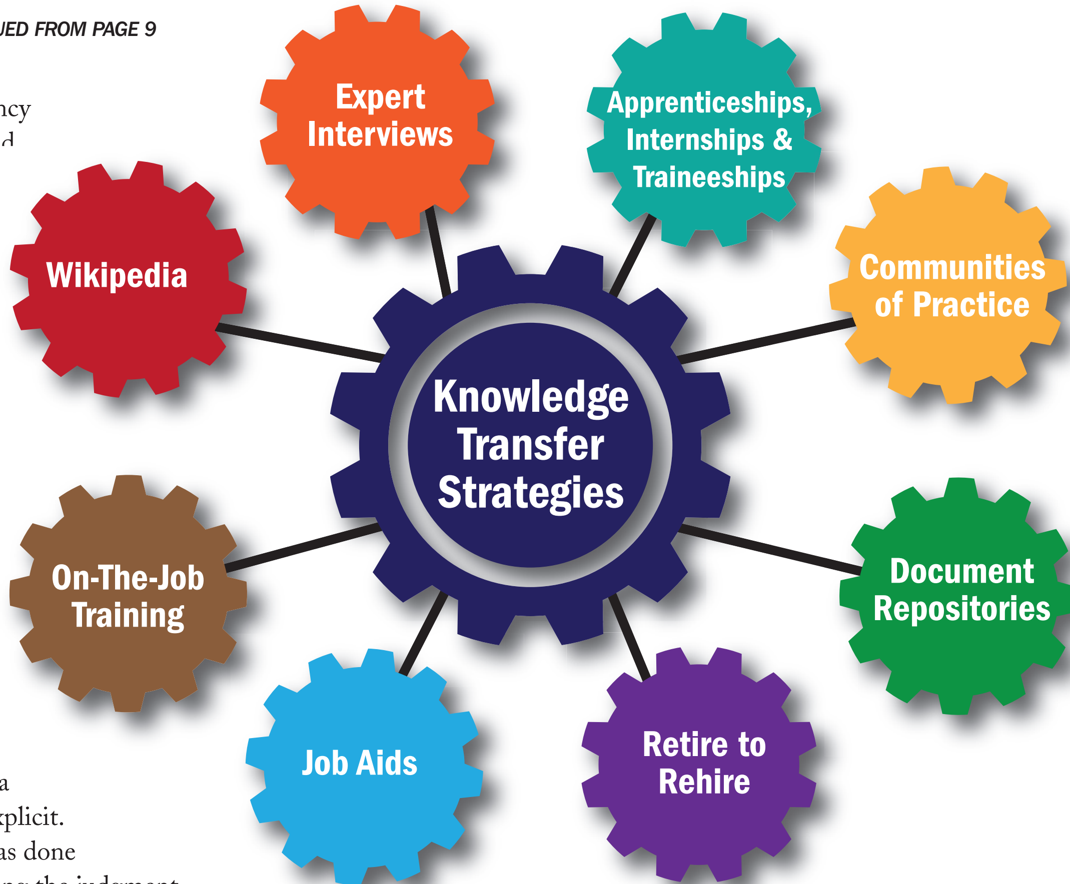

accompanying tactics will enable your agency to systematically and efficiently capture and transfer knowledge. The following is an inventory of knowledge management and transfer tools available for your agency to consider:

1. **Expert Interviews.** Expert interviews are sessions where one or more people, who are considered experts in a particular subject, program, process, policy, etc., meet with others to share their knowledge. The format of the sessions can range from informal one-on-one meetings to larger group sessions with a panel of experts facilitated by external consultants. Sessions can be audio- or videotaped or even transcribed if the subject is highly technical. Expert interviews are a way of making tacit knowledge more explicit. A person can describe not only what was done but why, providing context and explaining the judgment behind the action. Interviews are often easier for the experts than having them write down all the details and nuances. Learners can ask questions and probe more deeply to ensure understanding.

2. **Apprenticeships, Internships, and Traineeships:** Establishing these types of programs with colleges, universities and trade schools can serve to strengthen the pipeline of talent to replace existing staff, when the situation occurs, as well as simultaneously transfer knowledge about the agency's way of doing business.

3. **Communities of Practice:** A Community of Practice (COP) is a group of individuals, sharing a common working practice over a period of time, though not a part of a formally constituted work team. They generally cut across traditional organizational boundaries and enable individuals to acquire new knowledge faster. COPs can be more or less structured depending on the needs of the membership. These have proven very successful in those agencies where there are a high number of workers in the field such as utilities and street maintenance.

4. **Document Repositories:** Collections of documents that can be viewed, retrieved, and interpreted by humans and automated software systems (e.g. statistical software packages). Document repositories add navigation and categorization services to stored information. Keyword search capability is often provided to facilitate information retrieval.

5. **Retire to Rehire:** The easiest knowledge recovery tactic to employ when expertise walks out the door is hiring recent retirees back as contractors or consultants. Retirees not only have the skills needed but they also know the culture and organizational history, and have the extensive social networks necessary to get the work done, even when they are different from those they left. Bringing back retirees is most likely going to be a widely used short-term tactic for knowledge recovery in the years ahead. Using retirees as contractors, however, is a double-edged sword. It helps retain access to irreplaceable expertise, but it can also create a false sense of security that the organization still controls specific knowledge.

6. **Job Aids:** These are tools that help people perform tasks accurately. They include things such as checklists, flow diagrams, reference tables, decision tree diagrams, etc. that provide specific, concrete information to the user and serve as a quick reference guide to performing a task. Job aids are not the actual tools used to perform tasks, such as computers, measuring tools, or telephones.

7. **On the Job Training:** On-the-job training (OJT) is any kind of instruction that takes place at the actual job site and involves learning tasks, skills, or procedures in a hands-on manner. It can be informal, such as when a person asks a coworker to show how to perform a task, or part of a more formal structured OJT system. If part of a structured system, there are usually prescribed procedures for training that specify the tasks and

skills to be learned and that sequence the activities to build on knowledge already acquired. There are also administrative processes requiring both trainer (sometimes called a coach) and trainee to certify that a particular task or skill has been mastered. Structured OJT is usually more effective than informal; however, informal can also be valuable.

8. **Wikipedia** An internal wiki that serves as an electronic archive of knowledge that can be shared across the department. A wiki is a collaborative website that provides an easy way for people to upload and edit information online. Wikis organize data using the concept of "pages" where ideas or topics can be articulated in full, then specific words or segments are linked to related pages for in-depth discussion of a concept or practice. As such, wikis provide a modular way of viewing and storing information while supporting the fact that any piece of information pulls from or relies on other pieces of information.

The goal of retaining knowledge is always related to creating value through access and reuse—not just capturing intellectual capital for the sake of posterity. Knowledge management helps your organization track and transfer valuable knowledge. Dedicate the resources to retain this expertise before it is too late.

Patrick Ibarra, a former city manager and HR director, owns and operates an organizational effectiveness consulting practice, The Mejorando Group (www.gettingbetterallthetime.com), and is one of the country's leading experts on optimizing the performance of public sector organizations. "Mejorando" is Spanish for "getting better all the time," and Ibarra's firm brings fresh thinking, innovation and new ideas to help governmental organizations succeed in the 21st century. Ibarra is a noted author, speaker, blogger and educator who translates the headwinds that leaders are facing into a tailwind with practical, impactful and sustainable results. For those seeking additional information, Ibarra can be reached, either by phone at (925) 518-0187, email at patrick@gettingbetterallthetime.com, www.facebook.com/mejorandogroup and www.twitter.com/mejorandogroup. —N

IPMA-HR to Award Two Ronald Gabriel New HR Professionals' Conference Scholarships for 2013 Joint IPMA-HR/IPMA Canada International Training Conference & Expo

IPMA-HR, in memory of Ronald Gabriel, a longtime IPMA-HR member who left a bequest to the Association, is once again offering two Ronald Gabriel conference scholarships for the 2013 Joint IPMA-HR/IPMA Canada International Training Conference & Expo. To be eligible for this scholarship, an individual needs to be an IPMA-HR member—either an individual member or a covered staff member (CSM) of an IPMA-HR agency member—and have less than five years of HR experience. The value of each scholarship is up to $2,000, and can be used for hotel, travel, and meal expenses.

The 2013 Joint IPMA-HR/IPMA Canada International Training Conference & Expo will be held September 21-25 in Las Vegas. The deadline for the receipt of scholarship applications is July 5, 2013.

For more information, please contact Heather Corbin by phone at (703) 549-7100, or by email at hcorbin@ipma-hr.org. To download a PDF of the application form, please visit www.ipma-hr.org/sites/default/files/2013%20Ron%20Gabriel%20Conference%20Scholarship%20Application.pdf. To about other awards being offered this year by IPMA-HR, visit www.ipma-hr.org/public-sector-hr-community/awards-scholarships-fellowships. —N