Knowledge Transfer:

How to make sure you know what you don't know when you experience staffing changes

Tuesday, February 28, 2023

efc.syr.edu

THANK YOU TO OUR PARTNERS

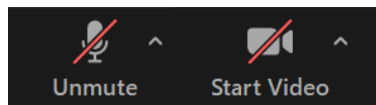| NEW YORK STATE TUG HILL COMISSION	NORTHERN ONEIDA COUNTY COUNCIL OF GOVERNMENTS	MOHAWK VALLEY ECONOMIC DEVELOPMENT DISTRICT
tughill.org	www.noccog.org	mvedd.org

ZOOM LOGISTICS

Audio/Webcam Settings

Mute, Unmute, select your audio source, or test audio settings. **Please stay on mute during presentation**
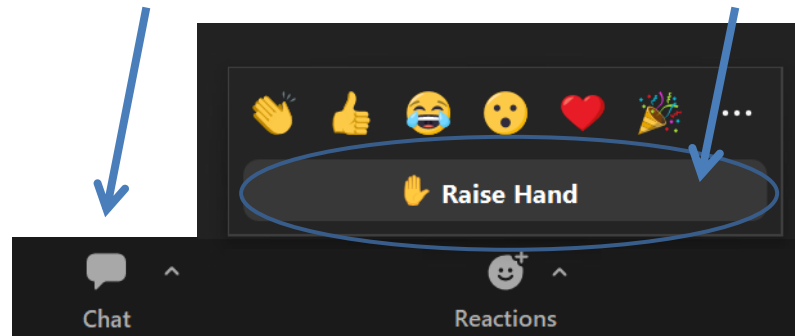
Turn webcam on or off

Asking a Question

Type questions into the chat box any time throughout the session

If you would like to unmute to ask a question, please **raise your hand** under the **Reactions** tab.

CERTIFICATES OF COMPLETION

Eligible attendees will receive a certificate of attendance for participating in this webinar today. This webinar has NOT been submitted to licensing agencies for preapproval of continuing education or training credits.

To receive a certificate:
- You must attend the entire session
- You must register and attend using your real name and unique email address

Questions about certificates can be directed to Averi Davis at **adavis02@syr.edu**.

KNOWLEDGE TRANSFER: HOW TO MAKE SURE YOU KNOW WHAT YOU DON'T KNOW WHEN YOU EXPERIENCE STAFFING CHANGES

After today's webinar, check the Syracuse University Environmental Finance Center's webpage for the video recording.

Please allow 1-2 days for us to post the material.

https://efc.syr.edu/webinar-knowledge-transfer-how-to-make-sure-you-know-what-you-dont-know-when-you-experience-staffing-changes/

What do we know?

"There are known knowns. These are things we know that we know. There are known unknowns. That is to say, there are things that we know we don't know. But there are also unknown unknowns. These are things we don't know we don't know."

--Donald Rumsfeld

What Keeps You Up At Night?

Human Capital Management

Human Capital Criticality

|	**Helpful** to achieving the objective	**Harmful** to achieving the objective
Internal origin (attributes of the organization)	**S** Strengths	**W** Weaknesses
External origin (attributes of the environment)	**O** Opportunities	**T** Threats

Succession Planning

Employees Leave.

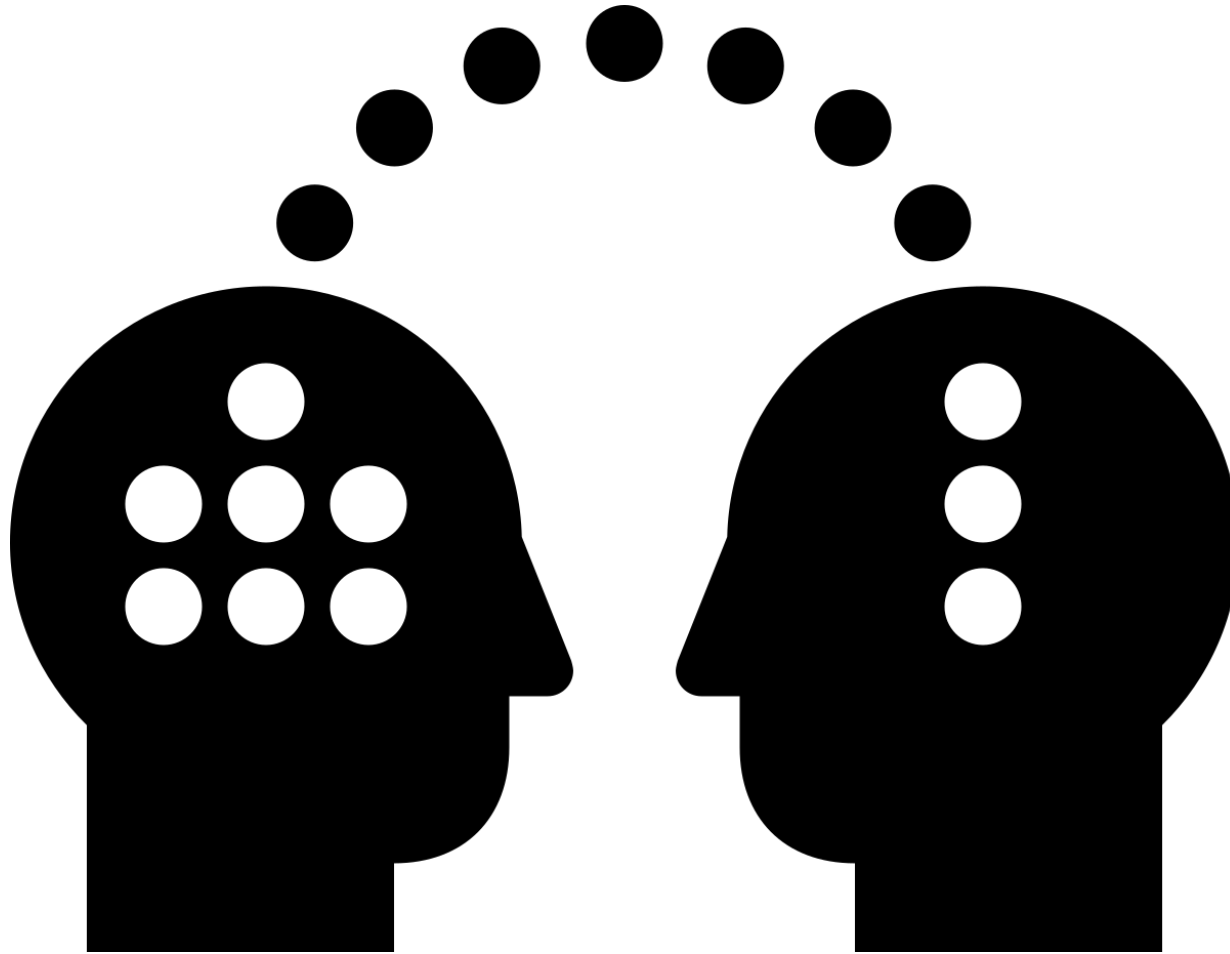They always do.

Preparation for that day is Succession Planning

Succession Plan

Proactive approach to **building replacement workers** to **ensure continuity**, by identifying potential successors in *critical* tasks

- Identify Positions
- Identify KSAs
- Assess People
- Develop Plan
- Monitor Plan
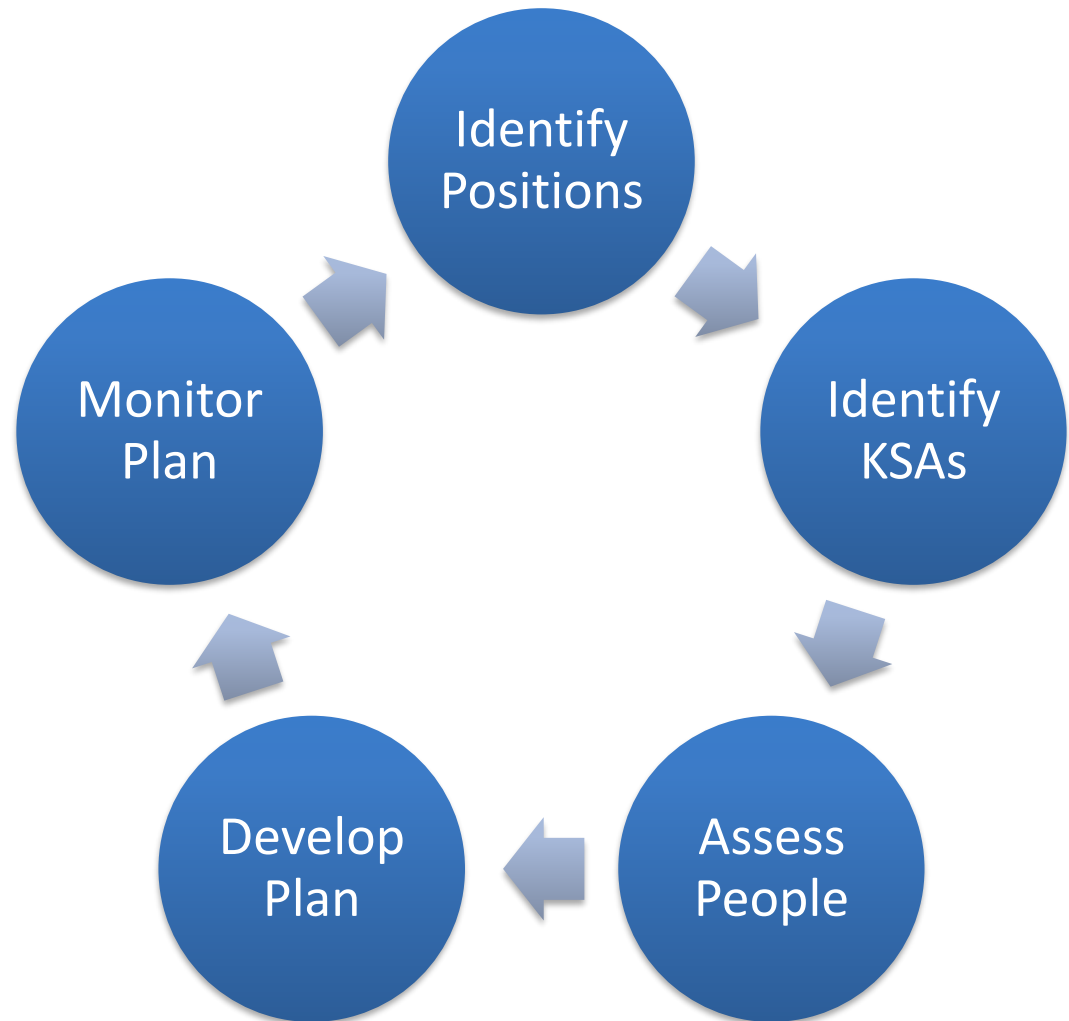
Knowledge Transfer

Keeping the "know-how" when you lose employees

Knowledge Transfer
It's not about what you **know**… it's about what you share

Knowledge Transfer Exercise
If I Knew Then…What I Know Now…

If you could go back in time...
what 3 pieces of advice would you go back and tell yourself?

Who knows what and when are they leaving? Are you worried about knowledge loss? Capacity?

If you had to leave the job quickly, what would you need to pass along, and how?

Types of Knowledge

EXPLICIT vs. TACIT KNOWLEDGE

Explicit Knowledge:

- ✓ Manuals
- ✓ Documents
- ✓ Procedures
- ✓ How-To-Guides
- ✓ Videos
- ✓ Databases
- ✓ Memos
- ✓ Notes
- ✓ Records

Tacit Knowledge:

- ✓ Individual Skills
- ✓ Expertise
- ✓ Education
- ✓ Experience
- ✓ Ideas
- ✓ Insights
- ✓ Intuition
- ✓ Observations
- ✓ Cultural Beliefs
- ✓ Values
- ✓ Attitudes
- ✓ Mental Models

ROCKET SOURCE

Methods for Transferring

Overlapping positions

Desk manuals

Pictures, video

Interviews

Work teams

Job shadowing

Transfer Through **Documentation**

Manuals

Maps

Photos

Videos

Notebooks

GIS

system diagrams

as-built drawings

policy guides

Transfer Through **Training & Development**

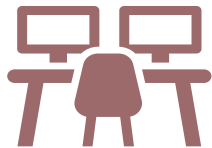*Online*

Workshops

Mentoring

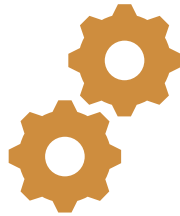*Computer simulations*

Classroom

Inter-agency

In house training
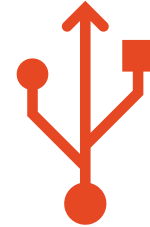
Transfer **Processes & Practices**

Maintenance schedules

Day-to-day Operations

regulated work

Technology

Training and Mentoring

Job sharing

Position Knowledge Inventory

Name: _____

Job Title: _____

Community/Organization/Department: _____

Years in your current position: _____

Years since you first started at your Community/Organization/Department: _____

Step 1: Organizational Goals

The purpose of this Inventory is to get an idea of the knowledge and responsibilities required to fulfill your current job position. Before we get to your specific knowledge, it's important to think about your organization's mission or goals so that the community can continue receiving all the services your job provides long after you leave that position.

Attach a copy of your community, organization, or department's overall mission, vision, and/or goals. Highlight the sections of these organizational documents to which you have contributed during your tenure.

Expand on the previous task by explaining in detail how your position helps your community, organization, or department achieve their mission or goals. In what ways does your job help carry out the mission?

Step 2: Critical Responsibilities and Activities

There are probably some aspects of your work that only you know how to address. In this step you are developing a list of those tasks and activities. Use questions below to help guide you in creating your list.

What are you the "go to" person for in your current position?
What things in your position do only you know how to do?
What responsibilities does your office rely on you for?

If you left your position today,
what wouldn't get done because
no one else knows how to do it?

When you return from vacation or otherwise being away from work, what work is usually waiting for you because no one else knows how to do it? When you're not working, is there anything you worry won't be done well while you're gone? If so, what?

If you are a supervisor, who reports to you and how often do you meet with them? Who counts on you to accomplish their own responsibilities? Are there other people outside of your official supervisory role who also tend to come to you for help because of your experience?

What information or experience would someone need to have in order to carry out your main responsibilities? Focus especially on things only you know and that others need to learn.

Is this knowledge and expertise currently available and accessible from anyone else in your work area? If so, who? If not, who might be the ideal person to take on those responsibilities?

Step 3: Position Knowledge & Experience

Now that you have identified aspects of your work that only you know how to address, use the questions below to start thinking about other knowledge and experience required to fulfill your job responsibilities

Do you have a list of physical assets that are 'assigned' to you, or that you use exclusively? Examples would include a computer, vehicle, software programs, files, or other equipment or documents.

☐ Yes   ☐ No

    If Yes, do these assets require Usernames/Passwords/keys?

    If Yes, would someone be able to find them if you were absent?

    If Yes, are there any other physical assets assigned to you that you did not mention above (e.g. Equipment)?

      ☐ Yes   ☐ No

        If Yes, what are those physical assets?

Do any of the assets you mentioned above come with a written Manual/Instructions?

☐ Yes ☐ No ☐ Not Sure

If Yes, are the instructions helpful or would you add to them? Please mention which asset(s) they are for.

Does your position depend on communication with any key contacts (internal or external)? Examples would include vendors, contractors, city/county staff, or employees at other departments.

☐ Yes ☐ No

If Yes, do those contacts include external agencies or regulatory groups (e.g. City/State/Federal)?

☐ Yes ☐ No

If Yes, do you maintain a list of these contacts, and if so where would someone be able to locate it?

☐ Yes ☐ No

Does your position require you to frequently visit any key locations (training rooms, offices, etc.)?

☐ Yes   ☐ No

If Yes, do you maintain a list of these locations, and if so where would someone be able to locate it?

☐ Yes   ☐ No

Are you responsible for managing financial or budgetary documents as part of your job?

☐ Yes   ☐ No

If Yes, which documents are you in charge of? Are they also managed by other people or do you have sole responsibility for each of them?

Are there other critical or historic files that one must know about or use in your position?

☐ Yes   ☐ No   ☐ Not Sure

If Yes, what historic or critical files are required for your position?

If Yes, do you know where one would access these files?

☐ Yes   ☐ No

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