What Will We Do Without You?

Retaining Organizational Knowledge When Workers Retire

Patricia Katopol

Introduction

The growing number of baby boomers leaving the workforce has managers in all fields concerned about the effect of retirements on retaining knowledge in the organization. In librarianship, there will be 8,187 retirements from 2009 - 2015 alone and another 7,020 from 2015 to 2020.[1] With forty percent of librarians in their 50's, the ALA forecasts that 28% of credentialed librarians who work in the United States will retire between 2009 and 2020.[2] And while some boomers may be pricing retirement condos in Florida, others will take an early leave from the workforce as their aging parents require care. With Americans living longer, it is not unusual for persons in their 60's, and even their 70's, to have living parents. On the other end, as boomers become grandparents, they may choose to leave their jobs in order to be closer to grandchildren or even provide childcare so that their adult children can work.

Fortunately, librarianship benefits from the many people who continue to enter the field. They bring with them enthusiasm for the profession and new skills in everything from technology to organizing video game nights for teens. These new grads come in at lower pay than their senior colleagues, which makes them an attractive hiring choice for administrators feeling budget constraints. However, even though they bring needed skills at a lower price, they may still be unaffordable, because tight budgets and the necessity to do more with less may mean that experienced workers are not replaced. In other situations, professional staff may be replaced by a revolving door of volunteers who are unlikely to have the knowledge of their predecessors.

Whatever the reason, library managers face losing organizational knowledge – the knowledge held by individual members and makes up what is known by the organization itself – the knowledge that makes the organization what it is.

Retaining Knowledge Through Knowledge Management

Libraries are information organizations,[3] not only in the sense that they contain large amounts of information resources, but that the most important asset of the organization is the information possessed by the workers in them.[4] Because not everyone can know everything, workers begin to specialize. For example, think of the different knowledge sets required to be a competent cataloger, electronic resources librarian, or literacy instructor. As people leave the organization, it becomes susceptible to losing this accumulated knowledge, knowledge which it needs to

make available to subsequent generations of employees if the organization is to be sustainable. This may not cause significant problems when staff turnover is relatively stable. New hires come in and there is time to learn from experienced workers before those workers move on. But when budgets or demographics change the situation so that experienced workers are no longer available to transfer their knowledge, managers have to consider how to retain knowledge in the organization.

The primary method for retaining and managing knowledge is to use knowledge management systems. Knowledge management is variously defined as a system that provides for organizational learning and memory by storing, retrieving, manipulating, and disseminating information,[5] capturing and organizing,[6] or systems to support organizational memory or expertise management[6.] It can also be described by the applications that it employs, such as email, groupware, computer conferencing tools, and databases.[7] Knowledge management can also focus on broad categories such as knowledge repositories, best-practices, and communities of practice.[8]

Initially, knowledge management focused on developing technologies to manage information. This perspective saw technology as the most important element and centered on tools that enabled document-handling, databases, and other methods of controlling large amounts of frequently used data. A more recent view, the *socio-technical* perspective, has gained popularity as it takes the human element into account and focuses on all aspects of managing knowledge – the knowledge in the people, the knowledge required to do the task, the knowledge that resides in the organization, and the knowledge creation and use that can be assisted by technology.[9]

Knowledge Management Doesn't Have to Be Expensive

Using knowledge management will help knowledge retention in two ways. Managers of cash-strapped or small libraries of any type should not be put off by the knowledge management literature that focuses on problem-solving with knowledge management in large, well-funded organizations, or glossy ads for expensive systems. There are numerous, low cost, ways to support knowledge management.

One of the easiest ways is simply to permit time for employees to talk with each other.[10] Conversation, whether it takes place around the water cooler, in the lunch room, or in the hallway is not necessarily interrupting 'real' work, but it *is* work that can support networking, information sharing, and problem solving.[11] Employees need time to talk to each other, [12] as well as time to sit and think alone, without worrying that someone will ask, 'Don't you have anything to do?'

Knowledge retention can be supported by activities such as *knowledge fairs*, which provide an opportunity for people from different departments to meet and exchange information informally.[13] Workers who may only know each other through telephone calls get the chance to put a face to the name. For some organizations, knowledge fairs might include representatives

from businesses or nonprofits outside of the library, such as representatives from immigrant literacy groups, vendors, or local social services.

Storytelling is another way to share information.[14] Staff can talk about problems so that others may learn the whole story of how problems were solved, not just the solution. Storytelling via video is also a good way to help new hires. If you can't afford to bring on a new employee before current staff leaves, have them make a video explaining their job, their frequent contacts, procedures, etc. which can be viewed by new employees. Ideally, however, a new hire would be able to shadow the current employee for at least a week. In the process, the new hire learns how the work is done and feels free to ask questions without fear of appearing inadequate for the job. In a shadowing situation, the current employee is more likely to recall systems, processes, and contacts that she might have forgotten were she just asked to write down a job description.

An 'after action review' is also a low cost activity. People working together on a project take the time afterward to discuss 1) what should have happened, 2) what actually happened, and 3) what made the difference between the two.[15] Often projects are wrapped up without review or evaluation. Take the time to have a review and to allow employees at all levels to participate. These reviews help spread information about projects, processes, and problems, and problem-solving throughout the organization and help staff form networks with others outside of their departments. They also recognize the contributions and expertise of all who contributed, not only the credentialed staff. Recognizing the contributions of all staff is important because everybody knows something of benefit to the organization. Don't fall into the trap of thinking that because paraprofessionals and support staff don't hold an MLIS, that they can be left out of knowledge retention and management efforts.

Another method of retaining and sharing information in this context might be what I call 'Solutions Days' or *SoDas*. Instead of the relatively free-floating environment of a knowledge fair, SoDas are structured meetings, with a moderator as in a focus group, in order to avoid adversarial interchanges or having the meeting devolve into a discussion of trivial topics. The goal of SoDas is to facilitate network building among or between departments, to discuss specific interactions and how they can be handled better, where they were handled well, and to help attendees understand the processes involved, so they can bring beneficial processes back to their home units. While SoDas do not permanently capture the information exchanged at the meeting, they do spread information quickly and among many people. Enough time should be built into the SoDa so that attendees can have breaks from the formal sessions and can meet and talk together informally. These informal interactions can be as meaningful and useful as any formal session, so allow enough time in the event for them to occur.

Knowledge fairs, storytelling, after action reports, and SoDas are simple, low cost ways that emphasize human connections to encourage sharing and personal interaction. They spread knowledge across the organization and help ensure that more people know what is happening and why it happens. By spreading knowledge among more people, these activities also help retain knowledge in the organization, as more than one person or one department has the memory of previous occurrences. What they do require is a 'champion' in management,

someone who understands the benefits of knowledge management and the need for employees to share organizational information in order to avoid losing it.

Don't Wait Until They're Gone

After years on the job, people tend to internalize their work routines and act on previous experience. When workers internalize most of what they do and why they do it in that way, it is more difficult to share information about their work processes. When they leave, they take that information with them. As time passes, the details surrounding projects and problems are forgotten. Without having captured how work is done (the 'what') and the reasons behind processes (the 'why') it will be difficult for those who follow to determine what lessons were learned or to develop best practices. Every job has information that will take new hires time to acquire. For example, a soon-to-retire academic librarian who conducts bibliographic instruction learned over the years, what lessons work best with the students at her school, a rural community college with many first generation college students. Without transferring some of her acquired knowledge to the new hire, that person may well spend valuable time designing courses that don't work as well as her predecessor's courses, which had the benefit of insight into the student body and years of trial and error experience. Future staff are likely to become less effective and efficient [16] because the organization will have forgotten what it knows since employees took large amounts of the organization's knowledge with them when they left.[17] Once it realizes the gaps in its knowledge, the organization is likely to spend time and money trying to reacquire expertise that it let walk out of the door.[17]

What will your organization do without its experienced employees? What organizational knowledge will you lose? How have you planned to share and retain knowledge in your organization, whether or not you are able to hire new employees or not? Library managers must be willing to become champions for knowledge management in their organization, to take the time to learn the technical and human-centered methods that best support their particular situation. Knowledge management is important in any organization at any time, but it is especially important when organizations are facing retirements that are likely to continue into the foreseeable future and which could leave their organization as less effective and less competitive than it might have been had knowledge management been considered a necessary function of library management.

References

1. Denise Davis. *Planning for 2015: The Recent History and Future Supply of Librarians*. Chicago: American Library Association, 2009.

2. Ibid.

3. Drucker, Paul, *Knowledge Work and Knowledge Society, The Social Transformations of this Century* The 1994 Edwin L. Godkin Lecture, John F. Kennedy School of Government, Cambridge, MA: Harvard University Press, 1994.

4. Stinchcombe, Arthur. *Information and Organizations*. Berkeley: University of California Press, 1990.

5. Katopol, Patricia, "Information culture of support staff in municipal government and implications for managerial decision-making" (PhD diss., University of Washington, Seattle, WA, 2007).

6. Thomas, John, Wendy Kellogg, and Thomas Erickson. "The Knowledge Management Puzzle: Human and Social Factors in Knowledge."*IBM Systems Journal*, 40, no. 4 (2001): 863 - 884.

7. Scholl, Jochen, *Knowledge Management and the Vital Organization*. Berlin: Springer-Verlag, 1998.

8. King, William, Peter Marks, and Scott McCoy. "The Most Important Issues in Knowledge Management." *Communications of the Association for Information Science*, 45, no. 9 (2002): 93-97.

9. Coakes, Elayne, Diane Willis, and Steve Clarke, eds. *Knowledge Management in the SocioTechnical World.* London: Springer-Verlag, 2002.

10. Fidel, Raya. and Maurice Green. "The many faces of accessibility: engineers' perception of information sources." *Information Processing and Management*, 40 (2004): 563–581.

11. Davenport, Thomas and Laurence Prusak. *Working Knowledge*. Harvard Business Review Press, Cambridge, MA, 2000.

12. Cohen, Don and Laurence Prusak, *In Good Company: How Social Capital Makes Organizations Work*. Boston: Harvard Business School Press, 2001.

13. See note 11 above.

14. Brown, John Seeley. Stephen Denning, Katalina Groh, Katalina, and Laurence Prusak *Storytelling in Organizations: Why Storytelling Is Transforming 21st Century Organizations and Management*. Boston: Butterworth Heinemann, 2004.

15. Trudell, Libby. "*4 Steps to Creating a Knowledge Sharing Plan*." *Information Outlook*, 10, no. 20 (2006): 27-30.

16. Katopol, Patricia. "*The Downside of Networks: The Negative Effects of a Graying Workforce on Knowledge Retention*." In *Knowledge Management: Competencies and Professionalism, edited by* Suliman Hawamdeh, Stauss, Kimberley, and Barachini, Franz, 77-84. Hackensack, NJ: World Scientific, 2008.

17. Liebowitz, Jay. "*Knowledge retention: What practitioners need to know*." *KM World* (2011): http://www.kmworld.com/Articles/PrintArticle.aspx?ArticleID=73363.

Patricia Katopol (patricia-katopol@uiowa.edu) is an Assistant Professor at the School of Library and Information Science, University of Iowa.