Developing a Proactive Plan for Organizational Knowledge Retention and Management
Who can’t your organization live without?
Preventing Knowledge Loss through Attrition

Focusing on the critical positions where knowledge loss is the greatest threat

Identifying and prioritizing the specific knowledge and skills at risk

Developing concrete, actionable responses to mitigate this loss.
Step 1: Conduct a Knowledge Loss Risk Assessment (Who has critical knowledge?)

Step 2: Identify specific knowledge risks

Step 3: Assess consequences and develop action plans

Step 4: Monitor and evaluate
Step 1: Knowledge Loss Risk Assessment

- The “Knowledge Loss Risk Assessment” is designed to identify positions/people where the potential knowledge loss is greatest and most imminent.
- Includes Ratings based on two factors:
  - Time until Retirement
  - Position Criticality
- Provides focus - Identifies positions where steps to mitigate knowledge loss may be needed.
**Retirement Factor**

The projected retirement dates in the work force planning system will be assigned a retirement factor as follows:

- 5 - Projected retirement date within current or next fiscal year
- 4 - Projected retirement date within 3\(^{rd}\) fiscal year
- 3 - Projected retirement date within 4\(^{th}\) fiscal year
- 2 - Projected retirement date within 5\(^{th}\) fiscal year
- 1 - Projected retirement date within or greater than 6\(^{th}\) fiscal year
Position Risk Factor

- An estimate of the difficulty or level of effort required to replace the position incumbent.

- **5** - 3-5 years of training and experience.
- **4** - 2-4 years of focused training and experience.
- **3** - 1 to 2 years of training.
- **2** - Less than 1 year of training.
- **1** - Requires little additional training.
Total Attrition Factor

Total Attrition Factor -- An estimate of the effort and urgency necessary to effectively manage the attrition.

20-25  -  High Priority
16-19  -  Priority
10-15  -  High Importance
1-9  -  Important
Step 2: Identify the specific at-risk Knowledge

- Conduct interviews with “High Priority” employees to ID potential knowledge loss areas
- Access consequences of loss using interview results and skill inventories

Interview provides data to:
- Define potential knowledge loss areas
- Evaluate consequences of loss
- Identify options to retain and transfer knowledge
- Develop action plans
Focus is beyond everyday tasks to deep, tacit knowledge:

- Historical Knowledge
- Special cases and strategic thinking
- Questions about Tasks (how ....)
- Questions about Facts or Information (what... who ...)
- Questions about Pattern Recognition
Step 3: Assess the Consequences and Develop Action Plans

- Assess consequences:
  - What is the relative importance of this knowledge item?
  - What is the rarity of this knowledge item?
  - What is the difficulty (cost and feasibility) of recover for this knowledge loss item?
- Prioritize risks and ID Options to Mitigate Loss
Step 3: Action Plan Options

Codification
- Documentation & Procedures
- Checklists, Inventories, etc.
- Performance Support Systems
- Concept Mapping

Engineer It Out
- Process Improvement
- Update Equipment
- “Smart” tools and technology
- Eliminate task, product or service

Education & Training
- Classroom and Simulator Training
- CBT, Video-based, and alternative delivery
- Coaching and Mentoring
- OJT and Targeted Work Assignments
- Coaching, Shadowing and Mentoring
- Apprenticeship Programs

Alternative Resources
- Agency/site/department expert
- Rotational or “Visiting” Staff
- Multi-skilling or Cross-training
- Contractors, part-timers, retirees
Step 4: Monitor and Evaluate

✔ Review updated Work Force Planning Attrition Data – *Ideally annually*

✔ ID areas that need to be reassessed (*Repeat Conduct Knowledge Loss Risk Assessment - Step 1*)

✔ Integrate established action plan progress into performance metrics

✔ Develop new action plans as new persons reach “High Priority” Total Attrition Factor
Putting it all together

• Systematically addressing at-risk knowledge has many “spill-over” effects

• Benefits and Outcomes

• Related Initiatives
Who needs to be “At the Table” to get this initiative off the ground?