

**City and County of San Francisco
Workforce & Succession Planning
Conference**



**Knowledge
Management**

September 25, 2009

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Presenter

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Session Objective

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- Learn practical ways of using knowledge management to strengthen your organization

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The Basics of Knowledge Management

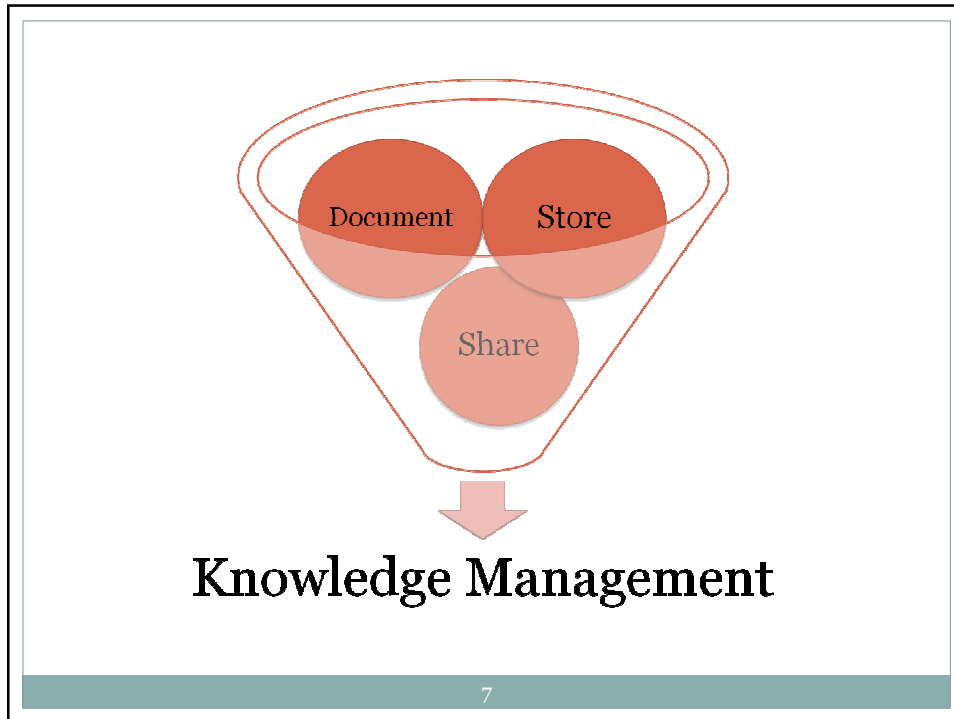
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It's about ensuring people have the **right** information **when** they need it

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"Why is common sense so uncommon?"



Document: Capture the Information

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• What to capture:

- How to do things – technical knowledge
- Who to call
- What policies to follow for what issue
- What the steps are in a process
- What happened when and why, what did we do about it, and what would we do differently today
- Best practices

• Who to get it from:

- Long time employees who are the sole source of critical information
- Newer staff who may see new and better ways of doing things
- Teams of staff who can map a process together or share information about a problem or issue

Store the Information

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Share the Information

The Possibilities Are Limitless

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- Interviews
- Questionnaires
- Informational exchanges
- Job rotations
- Internal internships
- Leadership academies
- Job shadowing
- Mentoring
- Joint problem solving (expert + novice)
- Technology
 - Internet
 - Intranet
 - Wikis
 - Video
- Social networks
- Storyboards
- Storytelling
- Retirees as coaches, trainers, consultants

Share the Information

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Share the Information

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A screenshot of the San Jose Wiki website displayed in a Windows Internet Explorer browser window. The browser's address bar shows the URL "http://www.wikispot.org/front_page". The website has a blue header with the "San Jose WIKI" logo and a search bar. Below the header, there is a "Front Page" section with a "Welcome to the community wiki for San Jose, California, USA!" message. The main content area is divided into several sections: "Explore" with sub-sections like "Orientation", "City Life", and "Transportation"; "Featured Page"; "Events"; "Mystery Picture"; and "Edit San Jose Wiki". The footer includes a "Done" status and a "100%" zoom level.

Four Case Examples

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- **City of San Jose**
 - Eileen Beaudry: eileen.beaudry@sanjoseca.gov
- **City of Livermore**
 - Donna Pontau: dzpontau@ci.livermore.ca.us
- **County of San Mateo**
 - Donna Vaillancourt: dvaillancourt@co.sanmateo.ca.us
- **City of San Mateo**
 - Linda Spady: spady@cityofsanmateo.org

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City of San Jose

A quarter of their 6,100 employees could retire within 5 years



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City of San Jose

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Talent Development Goals

- Targeted leadership development
- Address retirement wave
- Shift organizational culture to support diverse and talented workforce
- Build workforce capacity
- Build excellence and collaboration through partnered professional development
- Actualize the Citywide employee value of celebration
- Young people choose public sector careers

City of San Jose

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Talent Development Program Examples

- Documenting and sharing knowledge from senior level experts
 - ✦ Yellow Page experts: document what senior staff know
 - ✦ Recognition of senior level experts: encourage them to share their knowledge
 - ✦ Internal mentoring: 5 month pairings; HR provides structure, training classes
 - ✦ Training “on a dime” using in-house experts as trainers
- Encouraging people to prepare for promotions
 - ✦ The Art and Practice of Leadership
 - ✦ Leadership and Coaching Academy
 - ✦ Recognition of employees who complete a college degree

San Jose Water Plant

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- Increasing retirements
- Only 20% of the needed knowledge at the plant is documented
- Recently appointed a Knowledge Management and Transfer Manager
- New employees interview senior employees
- New plant operators interviewed to ask how they would label certain tasks
- Video taping senior level people doing certain tasks

- Valve rehabilitation



City of Livermore

Individual Initiative + Teamwork = Success

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Legacy Livermore

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- **Background:**
 - Design Team appointed
 - Facilitated process to create Legacy Livermore
 - Assigned full time person to support implementation
- **Content:**
 - 4 components
 - Mentoring, training, performance evaluations, information sharing, transferring knowledge
 - Legacy Scholarship – building resident experts

Legacy Livermore Core Competencies Defined for Every Level

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Core Competencies for Executive Leaders *(and others!)*

- Role models for the organization and community
- Actively empower and mentor others
- Visionaries
- Approachable
- Strategic thinkers and doers
- Foster a collaborative, creative culture
- Decision makers
- Motivate and recognize accomplishments

Expectations for Executives

- Actively support Legacy Livermore
- Help employees grow
- Participate in Legacy Institute (leadership academy) as trainers
- Walk the talk with knowledge transfer
- Provide leadership for transforming the organization further

County of San Mateo

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- **Background**
 - About 5700 employees
 - 47% Directors and 41% mid managers eligible to retire
 - Plus other resignations as talented staff get lured away
- **Succession planning** began in 2000, stepped up in 2005

County of San Mateo

Succession Planning Program

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- **Program goals:**
 - Attract talent
 - Develop leadership
 - Support employee engagement and retention
 - Optimize knowledge management
 - Improve individual and organizational effectiveness
- **Examples:**
 - Leadership development and training customized to all levels in the organization
 - Branding
 - Coordinated internship program
 - On-site degrees
 - Training on core competencies needed
 - Employee development plans

County of San Mateo

Two Succession Planning Examples

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1. Executive Leadership Academy

- 18 month program
- Prepare to become department heads
- 2 of 11 graduates to date have been promoted
 - ✦ Library Director
 - ✦ Deputy Director of Information Services

2. Transition management

- Now a core responsibility of managers
- Must do more than give notice of upcoming retirement
- Questionnaire provided to document knowledge and recommendations

City of San Mateo

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- Long tradition of training and development
- About 500 full time employees
- Lean budgets
- Resource sharing is key
 - Collaborating with San Mateo County and other cities on a training consortium
 - Two years ago began focus on knowledge management



City of San Mateo Knowledge Management

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- **Sharing across the organization**
 - Cross training (within a division)
 - Project management (developing those skills)
 - Rotational assignments (one to many months)
 - Overview training (about operations of various city departments)
- **Checklists for major processes**
 - Step by step flow charts
 - Developed on “real time” basis – as a process is undertaken, the person involved creates the checklist
- **Subject matter directories**
 - Who handles what – who to call

The City's next knowledge management focus will be documenting policies

City of San Mateo: Check list examples

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- Merit New Hire
- Demotion
- Merit New Hire (Caregiver)
- New Classification Procedure
- Provisional Appointment
- Transfer
- Limited Duration Appointment
- Salary Survey
- Separating Employee
- HR Background Procedure
- Quarterly New Hire Orientation
- Recruitment
- Death of an Active Employee
- Reclassification
- Disciplinary Action Log
- Disciplinary Checklist

What's Relevant for Your Dept?

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1. What are you doing to share knowledge in a structured way?
2. What is one technique you've heard today that you could follow up on?

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Cal-ICMA is a Resource

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- Telephone panels
- Webinars
- Speed coaching
- E-Coaching
- Seminars and educational programs
- One-to-one coaching
- Women Leading Government
- Networking with MMASC, MMANC, CSAC, HR Directors, other professional organizations

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Thank you!



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