
Preserving Institutional Knowledge

The first baby boomers reached retirement age in 2008, and every year more and more leave the workforce taking their knowledge and experience with them. Holding on to that knowledge and passing it on to the next generation is a challenge faced by many industries.

Institutional knowledge often rests with experienced, senior employees who learned best practices first-hand or from more experienced employees who have since moved on. While you cannot keep employees from retiring, you can take steps to lessen the impact and to ensure that their knowledge and expertise are passed on. Below are some tips to help your organization keep its institutional knowledge intact.

Avoid Silos

Long-term employees often have a broader understanding of how their job impacts other departments and tasks. To avoid information silos forming, have more experienced employees share their knowledge in routine meetings or by documenting the processes and procedures particular to their roles.

Cross-train Employees

Another way to mitigate knowledge loss is to cross-train employees. Have a newer employee spend three to six months working in another department. This will allow them to gain hands on experience in a new area and help avoid creating information silos. Be sure that all employees know that the cross-training is meant to build organizational knowledge across departments and should not be viewed as an attempt to push senior employees into retirement sooner than they are ready.

Consider Alternatives to Full Retirement

While some employees are eager to retire, others may be interested in working part-time or staying on as an as-needed consultant. These sorts of arrangements can help lessen the disruption caused when a long-term employee retires.

Plan Succession Across all Departments

Create a succession plan that accounts for each position's roles and responsibilities. As you hire new employees make sure that they have the skill sets needed to step into those roles.

Manage Across Generations

Older employees need to know that part of their job is to train newer employees. While newer employees need to know that being trained by more experienced employees is a key part of their jobs. Facilitate cross-generational learning by reminding employees to be open to different perspectives and work styles.

Make Annual Assessments

Conduct an annual retirement assessment. Pay special attention to groups of employees in the same departments who are nearing retirement age at the same time. Be sure that you have people ready to step into these roles as they open up to avoid being understaffed.

Do Not Wait Until They Retire

It takes time to transfer knowledge, so do not wait until a week before an employee retires and ask them to cross-train. Have soon-to- retire employees mentor, job share, or be shadowed by younger employees well before the retiring employees last day. Ask them to document process critical to their job, including details such as where files are kept.

What This Means for Counties

As the American workforce ages and more workers head into retirement, they take years of knowledge and experience with them. Take proactive steps to record and pass on that knowledge before it is lost. For questions about preserving institutional knowledge, contact CTSI at 303 861 0507. 