

Knowledge Journaling

Linda Heisler, Training Director
 Department of Health Services
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Knowledge Journaling
 What is it?

- Organizational history and institutional knowledge
- Experience and expertise
- Best practices and perspectives
- Contacts – Names, phone numbers, street and e-mail addresses
- Competencies
- Tips and tricks

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Knowledge Journaling
 What is it?

- Knowledge retention and transfer
- Continuity planning
- Emergency preparedness
 - Especially for key positions
 - Using the “3-deep” concept: at least 3 people should be prepared to substitute for incumbents in key positions
 - In coordination with COOP

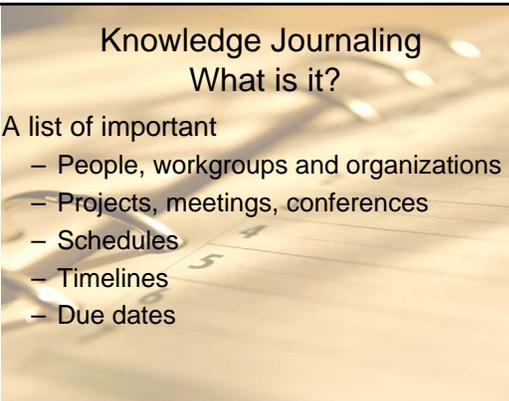
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Knowledge Journaling

What is it?

A list of important

- People, workgroups and organizations
- Projects, meetings, conferences
- Schedules
- Timelines
- Due dates



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What is it?

- Processes, procedures, protocols
- Technology: software, licenses
- Organizational culture
- Learning opportunities, courses, mentors, weblinks



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Knowledge Journaling

What is it?

- Documentation specific to how a specific employee (or team) accomplishes work
 - There is no "one-size-fits-all" solution

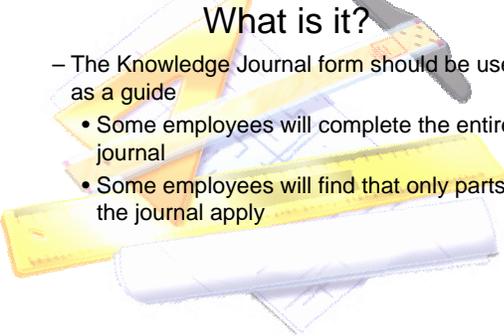


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What is it?

- The Knowledge Journal form should be used as a guide
 - Some employees will complete the entire journal
 - Some employees will find that only parts of the journal apply

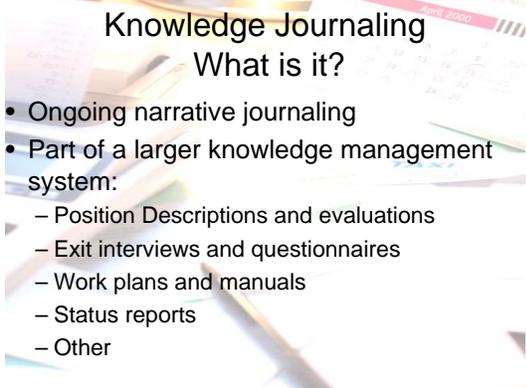


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Knowledge Journaling

What is it?

- Ongoing narrative journaling
- Part of a larger knowledge management system:
 - Position Descriptions and evaluations
 - Exit interviews and questionnaires
 - Work plans and manuals
 - Status reports
 - Other



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Knowledge Journaling

Why use it?

- Saves time
- Reduces duplication of effort
- Brings work into better strategic alignment
- Prepares for emergency management



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Knowledge Journaling Why use it?

Because it is a critical element of
Workforce Planning

- Recruitment
- Retention
- Retirement vulnerability



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Knowledge Journaling Why use it?

- Cross training
- Managing projects
- Delegating
- Coaching and mentoring
- Transitioning
- Managing change

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Knowledge Journaling Why use it?

– When an employee leaves your work
area, you will have valuable information
to help determine

- Should you fill the position as it
currently exists?
- What will the new employee need to
know?
 - Lets the new employee
“hit the ground running”



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Knowledge Journaling When does it begin?

- When you hire a new employee; on the very first day
- Ongoing
- If you wait until your employee has announced his/ her retirement, it's likely too late.

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Knowledge Journaling When does it end?

- Final thoughts
 - What works well?
 - What would you do differently?
 - What could the agency do differently?



Concerns

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Knowledge Journaling When does it end?

- Completion of the Knowledge Journal including:
 - Colleagues; peers in home agency and other; supervisor; others doing similar work
 - Contracts and budgets



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Knowledge Journaling When does it end?

- Exit interview and questionnaire
 - What could we have done to keep you?



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Knowledge Journaling When does it end?

- Having the journalist share the journal with a peer
 - Assigning a peer to
 - Review the knowledge journal with the journalist
 - Ask any relevant questions
 - Job shadow with the journalist



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Knowledge Journaling When does it end?

- Filing the knowledge journal
 - As determined by your agency or employing unit
- Updating the knowledge journal at least annually and as necessary



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Knowledge Journaling Where is it used?

- Is found in Learning Organizations
- Learning organizations are
 - Adaptive
 - Flexible
 - Capable of managing change
- Knowledge journaling doesn't happen by accident.



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Knowledge Journaling How is it demonstrated?

Learning organizations

- Recognize learning as “real work”
- Encourage portable competencies and skill sets



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Knowledge Journaling How is it demonstrated?

- Include learning in planning resources and processes
- Develop and manage knowledge
- Promote knowledge journaling



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Knowledge Journaling

Competencies

- Critical knowledge that can be learned, demonstrated consistently on the job, over time according to standard;

Core competencies

- Critical knowledge integral to the position or work unit.

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Team Journaling

- Completing a “radar screen”
- Process mapping
- Reviewing processes, procedures and protocols
- Strategic planning
- Mentoring



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Exit Interview Questionnaire

DEPARTMENT OF HEALTH SERVICES PUBLIC HEALTH DIVISION		STATE OF WISCONSIN PUBLIC HEALTH	
EXIT INTERVIEW QUESTIONNAIRE			
Complete this form with a supervisor. Note: "Critical knowledge" is not to be provided you are leaving.			
SECTION 1 - GENERAL DATA			
1.1) DEPARTMENT			
<input type="checkbox"/> 1 - DPH	<input type="checkbox"/> 2 - DPH	<input type="checkbox"/> 3 - DPH-AM	<input type="checkbox"/> 4 - DPH-C
<input type="checkbox"/> 5 - DPH-DM	<input type="checkbox"/> 6 - DPH-EP	<input type="checkbox"/> 7 - DPH-IC	<input type="checkbox"/> 8 - DPH-IP
<input type="checkbox"/> 9 - DPH-IR			
1.2) Current Departmental Status			
<input type="checkbox"/> 1 - Full-time	<input type="checkbox"/> 2 - Part-time		
<input type="checkbox"/> 3 - Part-time only	<input type="checkbox"/> 4 - Project		
1.3) Reason for Leaving			
<input type="checkbox"/> 1 - Retirement	<input type="checkbox"/> 2 - Resignation	<input type="checkbox"/> 3 - Layoff	
<input type="checkbox"/> 4 - Termination	<input type="checkbox"/> 5 - Dismissal	<input type="checkbox"/> 6 - Dismissal	
1.4) Geographic Location (Indicate your general location)			
<input type="checkbox"/> 1 - Madison	<input type="checkbox"/> 2 - Green Bay	<input type="checkbox"/> 3 - Oak Creek	
<input type="checkbox"/> 4 - Milwaukee	<input type="checkbox"/> 5 - Oshkosh	<input type="checkbox"/> 6 - Port Koshong	
1.5) Years of Current Position			
<input type="checkbox"/> 1 - 0 to 5 Years	<input type="checkbox"/> 2 - 6 to 10 Years	<input type="checkbox"/> 3 - 11 to 15 Years	
<input type="checkbox"/> 4 - 16 to 20 Years	<input type="checkbox"/> 5 - More than 20 Years		
SECTION 2 - PERSONAL DATA (FOR COLLECTION PURPOSES ONLY)			
2.1) Age	2.2) Gender	2.3) Position at Exit (Indicate job title)	2.4) Years of Service
<input type="checkbox"/> 1 - Under 30	<input type="checkbox"/> 1 - Male	<input type="checkbox"/> 1 - Year	<input type="checkbox"/> 1 - More than 10 years
<input type="checkbox"/> 2 - 30 to 40	<input type="checkbox"/> 2 - Female	<input type="checkbox"/> 2 - 2-5	<input type="checkbox"/> 2 - 10 to 20 years
<input type="checkbox"/> 3 - Over 40	Input, describe: _____	<input type="checkbox"/> 3 - 6-10	<input type="checkbox"/> 3 - More than 20 years
SECTION 3 - PERSONAL SATISFACTION			
A. How satisfied are you with your decision to leave your current position? (Circle a 1-5 rating)			
<input type="checkbox"/> 1 - Very Dissatisfied	<input type="checkbox"/> 2 - Dissatisfied	<input type="checkbox"/> 3 - Neutral	<input type="checkbox"/> 4 - Satisfied
<input type="checkbox"/> 5 - Very Satisfied			

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You don't
have time
not
to
Knowledge
Journal



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