



Knowledge Journaling

Linda Heisler, Training Director
Department of Health Services
2009

C 2006 Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Tacit v. Explicit Knowledge

Explicit Knowledge

- Concrete, quantifiable data
- Can be easily recorded and transferred via manuals, data bases, project and plans.

Tacit Knowledge

- “Softer,” qualitative, experiential, in context
- Can be transferred via mentoring, on-the-job learning and knowledge journaling

C 2006 Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Accessing Tacit Knowledge



- Mentoring
- Coaching
- Sharing stories
- Knowledge Journaling

C 2006 Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Accessing Tacit Knowledge



Retirement ?

Career Move ?

Emergency ?

Pandemic Situation ?

C 2006 Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What is it?

- A practical and creative means for retaining and transferring critical knowledge through journaling
- A strategy for collecting and maintaining both explicit and tacit knowledge
- One piece of the knowledge management system

C 2006 Knowledge Journaling
Linda Heisler, DHS Training Director

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

C 2006 Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What does it include?

- 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

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What does it include?

A list of important

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

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What does it include?

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



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What does it include?

- Web links
- Resources
- Books, authors

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What does it include?

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

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What does it include?

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



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling What does it include?

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

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Why use it?

Because it is a critical element of
Workforce Planning

- Recruitment
- Retention
- Retirement vulnerability

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

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 in order to “hit the ground running”?



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Why use it?

- Saves time
- Helps reduce duplication of effort
- Brings work into better strategic alignment

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Why use it?

- 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
- Continuity planning
 - In coordination with COOP
- Retain and transfer critical knowledge under ordinary conditions

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Why use it?

- On-boarding
- Cross training
- Managing projects
- Delegating
- Coaching and mentoring
- Transitioning
- Managing change
- Succession planning

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Why use it?

- To confirm existing competencies
- To develop new competencies

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling When does it begin?

- When you hire a new employee, on the very first day
- Ongoing throughout an employee's career

Remember:

If you wait until your employee has announced his/ her retirement, it's likely too late.

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling When does it end?

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

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

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

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

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



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling When does it end?

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



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Where is it used?

- In learning organizations
- Learning organizations are
 - Adaptive
 - Flexible
 - Capable of managing change
- Knowledge journaling doesn't happen by accident.

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Where is it used?

Learning organizations

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



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Personal Benefits

- Promotes my own personal growth
- Supports my career development
- Helps me reflect critically on my own work
- Serves as a memory jogger

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Team Journaling

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



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Team Journaling

Identifying

- Competencies
 - Critical knowledge that can be learned, demonstrated consistently on the job, over time according to standard
- Core competencies
 - Critical knowledge and attitudes integral to the position or work unit

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling Where do we start?

- Make workforce planning a strategic priority
- Identify key positions vulnerable positions
 - Lack of bench strength
 - Possibly vulnerable to retirement
- Identify competencies for key positions

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

DHS Mentoring Program

DEPARTMENT OF HEALTH SERVICES STATE OF WISCONSIN
DEPARTMENT OF SERVICE Office of Employee Development and Training
People at Work

MENTORING PROGRAM APPLICATION

USE THIS FORM TO REGISTER YOUR INTEREST IN BECOMING A MENTOR OR A MENTEE.
DISABILITY ACCOMMODATIONS: Accommodation of testing and special needs of participants is the responsibility of the sending employing unit. If accommodations are planned, notify the DHS Office of Employee Development and Training as soon as possible.

INDICATE ONE ROLE FOR WHICH YOU ARE APPLYING: Mentor (You wish to be a mentor) Mentee (You wish to be mentored)

Type of First Name: _____
Last Name: _____

PROFESSION: _____ OFFICE: _____ INDUSTRY: _____ BUSINESS: _____

CITIZENSHIP: _____ AREA CODE / TELEPHONE NUMBER / TTY: _____

WORK ADDRESS: _____
Room No. _____ Street _____ City _____ Zip Code _____

NUMBER OF YEARS IN YOUR CURRENT JOB: _____ NUMBER OF YEARS IN STATE SERVICE: _____ NUMBER OF YEARS IN DHS: _____

HAVE YOU SERVED AS MENTOR / MENTEE? No Yes If Yes, provide the following information:
Prospective Mentor / Mentee - Name: _____ Division / Office: _____ Area Code / Telephone No.: _____

WHERE WOULD YOU MOST LIKE TO BE INVOLVED IN THE PROCESS OF OBTAINING A MENTOR / MENTEE FOR YOU? _____

C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director

Knowledge Journaling

You don't
have time
not
to
Knowledge
Journal



C 2006

Knowledge Journaling
Linda Heisler, DHS Training Director
