CITY OF LOS ANGELES

KNOWLEDGE TRANSFER GUIDE

BACKGROUND

This guide has been created to assist City employees with understanding the importance of *Knowledge Transfer*. Take some time to go over the information in this guide with your team to learn more about establishing a knowledge transfer process that works best for your unit.

THINGS TO KNOW

WHAT IS KNOWLEDGE TRANSFER?

Knowledge transfer is the process of passing on knowledge, skills, or information from one person or group to another. It helps ensure valuable information is shared and used effectively, especially when someone new joins a team or when an experienced person leaves.

By preserving knowledge, organizations can minimize disruptions of operations, expedite new employee onboarding, and keep information centralized and organized.

WHEN SHOULD KNOWLEDGE TRANSFER HAPPEN?

Knowledge transfer is essential when key employees are leaving, retiring, or transferring out of the organizations. It can also be used when a new person joins the team, as it helps them understand processes, workflows, tools, and organizational culture.

Unfortunately, knowledge transfer is oftentimes not taken into consideration until it is too late. Employees often neglect to document tasks or procedures, and management fails to prioritize knowledge transfer until an employee is on the verge of leaving the organization. Delaying knowledge transfer until an employee leaves often results in insufficient time to properly train successors, critical information being overlooked, or a lack of guidance. This leaves those stepping into the role feeling stressed, overwhelmed, and unprepared to take on their new responsibilities effectively.

Our hope is that we make knowledge transfer a norm in the City. Let's not wait until it's too late!

WHY IS KNOWLEDGE TRANSFER SO IMPORTANT?

As mentioned, knowledge transfer can minimize the operational disruption of an organization when an employee leaves or even joins a team. Truly effective knowledge transfer plans can also increase employee engagement. A study by Brandon Hall Group found that organizations with solid knowledge-sharing practices experience a 20% increase in employee engagement. When an employee has the resources and knowledge available to succeed, it leads to more engaged employees and a higher percentage of retention.

TAKE THE KNOWLEDGE TRANSFER COURSE!

To get a better idea of how knowledge transfer works, we encourage employees to watch the knowledge transfer training on Cornerstone. Simply click on the link below to log in to Cornerstone and launch the course. This training has tons of materials/templates available for you and will be helpful to review before implementing your own knowledge transfer strategies. If your department does not utilize Cornerstone, please reach out to your department's HR/Training group.

Knowledge Transfer - A City of Los Angeles Interactive Course

THE DIFFERENT LEVELS TO CONSIDER FOR KNOWLEDGE TRANSFER

Start big, end small. It may seem silly, but before each individual person creates a knowledge transfer plan, you and your team should first establish an overview of what your division does. The information in a division overview may seem obvious to people who are already on the team, but those who come in as a new employee will not have any idea. This guide will show you how you can start at the high level of a division overview, then make your way down to the individual staff members and the tasks they complete.

CREATING A DIVISION/SECTION OVERVIEW

By first giving employees an overview of your division, you will help them understand where your group falls within the department as a whole. In turn, this will help them better understand the importance of their job and the individual tasks they are responsible for.

An example of a division overview is noted below. A template with these items is also included as Attachment A.

EXAMPLE OF DIVISION/SECTION OVERVIEW

DIVISION/SECTION NAME: *PIROE* **DATE (M/Y):** *NOVEMBER 2024*

1. **Identify your division/section's role in Personnel.**

   The Personnel, Innovation, Recognition, Onboarding, and Engagement (PIROE) team oversees the online training platform for City employees in addition to other training programs available across the City. We are also responsible for developing and implementing various engagement strategies in the Personnel Department.

2. **How does your section contribute to the department?**

   PIROE helps to not only ensure employees complete mandatory training, but also that employees have access to resources which can help them with their development. We make sure that employees understand the importance of taking care of themselves and continuing to learn and grow. Our staff also includes a Graphics Designer who is constantly helping other sections within the department create user friendly guides and documents, while maintaining branding and design standards for Personnel.

3. **What are the main roles and responsibilities that your division/section has?**

   PIROE oversees various training programs including online training, Core Supervisory Training, the Women's Management Academy, and the MOU Reimbursement programs across the City. We also oversee Personnel Department engagement programs including Coffee Talk, Mid-Month Mindset/10-Minute Takeaways, and AwardCo. Our role requires oversight of numerous email accounts, ongoing correspondence with employees at all levels regarding training requirements/department training needs, developing training curriculums, tracking training compliance, establishing and designing new engagement methods, and more.

4. Does your division/section have a website?

Yes. information on the programs PIROE oversees can be found on the **Engagement and Training portion** *of the Personnel Department's public website. PIROE also has an* **Engagement and Training Portal** *that is available to Personnel Department employees. (Note: Links to websites should be clickable so new employees can view what you are referencing. Items in this example are not clickable).*

5. Are there any guides or policies that your team uses?

PIROE often refers to the Controller's Travel Policy for MOU Reimbursement requests. Additionally, PIROE refers to various Executive Directives (Ex: EDs 16, 27 and 34), as these EDs are tied to specific training requirements.

6. What other divisions/departments or sections does your group work with?

In addition to working with sections within Personnel, we work closely with employees in other departments. Members of PIROE receive questions from employees at all levels related to training, joining current programs, etc. Additionally, PIROE corresponds regularly with Department Training Coordinators and City leaders to discuss training needs, respond to questions, and provide guidance for developing training materials.

7. Are there particular dates or time frames that are important for your section?

Not specifically. The most important dates we have are related to training completion deadlines. Generally, trainings are required on an annual or bi-annual basis. These deadlines vary depending on the training. We have an internal schedule for when we assign trainings Citywide.

8. Any other items to note?

Welcome to PIROE!

Note: When creating an overview of your division, it may be tempting to list as much as possible so you can show how much work your team does. However, this is not the point. The point of this overview is to essentially give an explanation of the basics of your division to someone who may not be as familiar with it.

CREATING AN INDIVIDUAL OVERVIEW

Once you create an overview of the division, you can create similar overviews for specific sections (if needed), then have employees complete one for their individual roles. An example of an individual overview for knowledge transfer is below and is also included as **Attachment B**.

EXAMPLE OF INDIVIDUAL OVERVIEW

NAME: *Jane Doe* **DATE (M/Y):** *NOVEMBER 2024*

JOB TITLE: *Personnel Analyst*

DIVISION/SECTION: *PIROE*

LIST MAIN TASKS/DUTIES

Create a list of common tasks that you perform. Please note this does **not** have to be extensive, but should cover your **MAIN** responsibilities.

1. *Respond to all inquiries received in email accounts PIROE oversees (Daily)*
2. *Track compliance with online training and current City training programs (Daily)*
3. *Assist with password resets and general oversight of the Cornerstone platform (Daily)*
4. *Upload, test and assign training in Cornerstone (Ongoing)*
5. *Meet with departments to discuss training needs (As requested)*
6. *Create and send Coffee Talk, Theme Day, and Mid-Month Mindset/10 Minute Takeaway emails. (Monthly)*

POINT OF CONTACTS

List all contacts that you communicate to complete your tasks (Internal and external). If this is an extensive list, then you can simply note the main contacts/types of contacts you have, and the reasons for communicating with them.

1. *Department Training Coordinator Contact List - used to communicate with Training Coordinators when discussing Cornerstone/training related items.*

SPECIAL PROJECTS

List any special projects you are currently working on or involved with. If there is a particular contact person or group that oversees the special project, please note it here as well.

1. *Women's Management Academy (Annual Program)*
   a. *Main contact: Eddie Edward with Council Offices*
2. *Creating the Annual Report for Employee Development (Due in December)*
   a. *Main contact: None. Once the report is finished, sent to manager Kevin McCallister for final approval.*
3. *Working with Sanitation to release new training (launch planned for January)*
   a. *Main contact is April Showers with Sanitation*

FREQUENTLY USED SOFTWARE (IF ANY)

Frequently used software (outside of Gmail, Microsoft, etc.) and briefly explain what it is for.

1. *Articulate Storyline - Used when creating training files (as needed)*
2. *Google Videos - Create training videos for staff*

FREQUENTLY VISITED WEBSITES (EXPLAIN):

1. *Cornerstone -* **lacity.csod.com** *- Upload, assign and track online training*
2. *Cornerstone Pilot -* **lacity-pilot.csod.com** *- Test online courses before they are put into main Cornerstone environment*
3. *GSA PerDiem -* **gsa.gov/travel/plan-book/per-diem-rates** *- Verify per diem rates for MOU Reimbursement requests*

GROUP / DELEGATED EMAIL ACCOUNTS YOU HAVE ACCESS TO (IF ANY):

1. *[Group emai]l (for Training and Engagement)*
2. *[MOU Email] (for MOU Reimbursement Requests/Tracking)*

Note: For the purposes of this guide, emails are not listed. Forms should include the email address and description.

CREATING A TASK OVERVIEW

Now that we have an overview of the section, followed by an overview of the individual, we can dive into specific tasks. For example, in Jane Doe's Individual Form above, we can select the task of password resets. Jane Doe can document this process in several ways. Please note that you don't have to transfer knowledge in multiple ways. However, you should consider the type of task you are documenting and determine the best method for you. Below we included two potential ways to document a process. An example of the task form is found below as well as in **Attachment C**.

EXAMPLE OF TASK SPECIFIC KNOWLEDGE TRANSFER

SELECTED TASK

Assist with password resets and general oversight of the Cornerstone platform (Daily)

Option 1: Written Instructions

1. *Sign in to Cornerstone using your admin password.*
2. *Hover over the Admin tab and click on Users.*
    a. *Records can be found using any of the search fields.*
    b. *Partial values can be used, but only the start of the name or number*
       Example: "Johnson" can be found using "Joh"
       Example: Employee ID "23456" can be found using "23"
    c. *If you are searching for an inactive user, you must change the "Active" selection to "Inactive" or "All".*
3. *All results matching your search criteria will be displayed at the bottom of the screen.*
4. *After you have found the employee you are looking for, click on the options drop down menu ( ) to the right of their name.*
5. *Select the Change Password option.*
6. *A new window will open.*
    a. *The first option is to send the password-reset email.*
    b. *To reset it manually, select the Define a temporary password and press OK.*
7. *On the Change Password page, you will type the new temporary password.*
    a. *We recommend using the password (Password1), but anything that meets the criteria will work.*
    b. *The user will use this temporary password for an initial login and be required to change it once they have logged in.*
8. *Once the password has been reset, email the employee and notify them of their temporary login credentials using the email template in pertraining@lacity.org.*

Option 2: Record a Video

Recording yourself completing the task in Google or Zoom is a GREAT way to show how you complete certain tasks. These videos can be saved into a folder accessible to your team, so people can reference it easily even if you are away from the office.

GENERAL TIPS FOR TRANSFERRING KNOWLEDGE

1. Remember, knowledge transfer should be **ongoing**. Be sure to revisit and update any forms, templates or videos you create a few times a year. That way if someone new comes in or if someone leaves unexpectedly, the items are as up to date as possible.
2. Consider the type of task you are documenting when determining the best way to transfer that knowledge.
3. Don't forget, everyone is different. Just because something makes sense to you, does not mean it will make sense to someone else. Be thorough in your explanations and walk-throughs, especially for more complex tasks.
4. After you document a process, it can be helpful to give it to someone who is less familiar with the process and see if the steps make sense. This will help you revise your instructions. A template of evaluation questions that you can give to someone unfamiliar with the process for testing can be found in Attachment D.
5. Always date your Section/Individual/Task Guides after you update them. This will help you keep track of the last time the form was updated and determine if more changes should be made.
6. Remember, just because you are familiar with terms/lingo, doesn't mean everyone else is too. Be sure to define any acronyms to new team members and spell out acronyms the first time they are introduced within a written document.
7. If more than one person completes a task on your team, try and work together to create one form on how to complete that task. This will ensure the methods are consistent and won't cause confusion if someone new comes in and sees multiple forms for one process.
8. Check out how to make Google shared drives and save all of your resources (and your team's resources) in one spot. That will make things easy for anyone to find if you are out and someone needs information!

GENERAL TIPS FOR TRANSFERRING KNOWLEDGE

Keep in mind that there are multiple ways to transfer knowledge, especially individual tasks. Be sure to review the **Knowledge Transfer (KT)** course in Cornerstone to download helpful templates and explore different methods and find the ones that work best for you.

CLOSING

The goal for this guide is to begin the Knowledge Transfer process and ensure there is a clear understanding of the broad overview of the division, then break it down into smaller parts. That way, by the time someone is reviewing the specific tasks and duties they are taking over from an individual, they will already know how those items fit into the bigger picture. Essentially, take it one step at a time - start big and end small.

Division Overview → Position Overview (individual) → Duties and Responsibilities Breakdown

Remember, knowledge transfer is a vital practice for maintaining continuity, efficiency, and growth within any organization. By documenting and sharing essential processes, teams ensure that skills and insights are preserved and accessible. This helps in reducing the learning curve for new members and strengthening overall performance. To keep knowledge transfer effective, information should be updated frequently to reflect the latest changes within the organization. When core knowledge is kept current and accessible, organizations create a strong foundation for collaboration, innovation, and sustained success.

ATTACHMENT A

DIVISION/SECTION OVERVIEW

DIVISION/SECTION NAME: ______________________ **DATE (M/Y):** ____________________

1. Identify your division/section's role in ______________________________ department.

2. How does your section contribute to the department?

3. What are the main roles and responsibilities that your division/section has?

4. Does your division/section have a website?

5. Are there any guides or policies that your team uses?

6. What other divisions/departments or sections does your group work with?

7. Are there particular dates or time frames that are important for your section?

8. Any other items to note?

ATTACHMENT B

INDIVIDUAL OVERVIEW

NAME: ______________________ **DATE (M/Y):** ______________

JOB TITLE: ______________________

DIVISION/SECTION: ______________________

LIST MAIN TASKS/DUTIES

Create a list of common tasks that you perform. Please note this does **not** have to be extensive, but should cover your **MAIN** responsibilities.

POINT OF CONTACTS

List all contacts that you communicate to complete your tasks (Internal and external). If this is an extensive list, then you can simply note the main contacts/types of contacts you have, and the reasons for communicating with them.

SPECIAL PROJECTS

List any special projects you are currently working on or involved with. If there is a particular contact person or group that oversees the special project, please note it here as well.

FREQUENTLY USED SOFTWARE (IF ANY)

Frequently used software (outside of Gmail, Microsoft, etc.) and briefly explain what it is for.

FREQUENTLY VISITED WEBSITES (EXPLAIN)

GROUP / DELEGATED EMAIL ACCOUNTS YOU HAVE ACCESS TO (IF ANY)

ATTACHMENT C

TASK SPECIFIC OVERVIEW

Use the following template to list a specific task and link the method used to transfer the knowledge. Additional methods for recording tasks can be found in the Knowledge Transfer course.

Reminder: You do not have to include multiple options/instructions for completing a task, but can if you would like.

SELECTED TASK

Option 1: (Tool Used)

Option 2: (Tool Used)

ATTACHMENT D

KNOWLEDGE TRANSFER PROCESS EVALUATION

This form is to be filled out by someone who is rating a knowledge transfer process. Ideally, this person is someone who does not usually complete the listed task. The purpose of this is to ensure that the knowledge transfer tools that are being created are effective and make sense to outsiders who may not have familiarity with the task (such as new employees). This will help employees determine if their explanations are helpful, if more detail is required, if the information made sense, etc.

BACKGROUND INFORMATION

EVALUATOR NAME: ____

DEPARTMENT/DIVISION: ____

KNOWLEDGE TRANSFER PROCESS/TASK FOR EVALUATION: ______________________________

(Example: Reviewing knowledge transfer guide for uploading data into Workday)

NAME OF KNOWLEDGE TRANSFER PROCESS CREATOR: ________________________________

EVALUATION QUESTIONS

1. What type of Knowledge Transfer process/material did you review?

- ○ **a.** Written Instructions/Guide
- ○ **b.** Video Walkthrough
- ○ **c.** In-Person/Live Walkthrough
- ○ **d.** Other

Y ☐ N ☐ **2.** Was the information presented easy to understand?

Y ☐ N ☐ **3.** Were you able to follow along with the guide/instructions without needing additional information?

Y ☐ N ☐ **4.** Were there any steps to the process missing, or requiring additional guidance?

Y ☐ N ☐ **5.** Was the pace of the information presented appropriate? (Ie, did walkthroughs move too fast?)

Y ☐ N ☐ **6.** If you were a new employee, would you find this guide/instruction helpful for this particular task?

Y ☐ N ☐ **7.** If you were asked to complete this task in the future, would this material be helpful for you?

Y ☐ N ☐ **8.** Would you recommend that someone completing this task review this information?

Y ☐ N ☐ **9.** Do you believe this guide or walkthrough require ongoing updates given the type of tasks completed?

Y ☐ N ☐ **10.** Do you have any recommendations for the creator or this process/material?