



# Why Wisdom Is Being Lost – and How You Can Capture It

Vital knowledge will slip away without a plan to contain it.

By Chantel C. Upshur-Myles

**C**risis, crisis, and more crises! As an aging population revolutionizes our coming workforce, is the nonprofit sector prepared for the resulting talent war? Can it maintain its service proposition in the future?

More than 76 million baby boomers will retire over the next 20 years, taking with them the collective wisdom of a generation. The loss of boomers' talent, wisdom, and insight will, if not addressed soon, be devastating for most organizations.

A similar situation evolved around the Y2K computer scare, notes James Canton. Though the worst-case scenarios never materialized, "it is notable that during the months preceding the end of 1999 it was difficult to find older tech workers who had the specific knowledge necessary to fix the older systems that operated with lost languages."<sup>1</sup>

Canton's organization, the Institute for Global Futures, analyzed

this trend in one company. As Canton reports, "An inventor had tried to pass along the secrets of the business...to the next generation. There was too much information to communicate, however, and too little time."

This experience will be replicated countless times unless we prepare for the transition that will occur as baby boomers leave. No systems have been put in place to codify, communicate, and share

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boomers' wisdom at the rate that's needed to pass the knowledge on to the next generation. Without advance planning, this loss of knowledge will restrict our ability to serve our clients, fulfill our missions, and provide employees with the skills they need.

As Canton points out, we're already seeing the warnings of this future as insights about leadership, marketing, and other essentials drop away. The design of communications systems and other life-sustaining systems date back to boomer days, and boomers are taking that knowledge with them as they step aside and new leaders take over.

## How Do You Make It Happen?

Consider these suggestions to capture the wisdom of the boomers before it's too late:

**1. Shift your mind toward the future.** Such a mind shift is the most important thing you can do to ensure your organization's success. So that you don't get too caught up in daily tasks, pencil in an hour each day when you do nothing but focus on the future. Ask others in your organization to do the same. Several times a year, hold blue-sky meetings and retreats at which key organizational leaders discuss potential futures and offer scenarios to confront emerging problems and take advantage of opportunities. Build boomer talent into those dis-

cussions; consider it your secret asset.

**2. Interview staff** to capture knowledge you'll need to educate future talent. Ask employees to put in writing the key things they've learned about their work and the systems used to support it. Be especially scrupulous about compiling people's knowledge if they'll be leaving your organization soon.

When training and developing new leaders, have them talk to boomers who held their leadership positions in the past.

**3. Craft mentoring programs** and discussion forums. Ask such groups to focus on acquiring boomer knowledge as one of their prime goals. "Whether with staff or in your volunteer cadre, mentoring passes on *knowledge and perspective*, both of which are crucial," as Peter Brinckerhoff affirms.<sup>2</sup>

**4. Use technology** to secure the transfer of knowledge from the generation that's retiring to the one that's soon to come. Document boomers' expertise on video and multimedia, and create a data library in which to store it and distribute it on demand.

**5. When training and developing new leaders**, have them talk to boomers who held their leadership positions in the past.

**6. Develop consultative, contractual, or volunteer relationships** with retirees and with organizations serving older people, such as AARP ([www.aarp.org](http://www.aarp.org)). Such connections will help you access invaluable knowledge while filling the gap for those who want to feel useful after retirement.

**7. Recruit retired executives** onto your board, where they can provide valuable insights about the past.

**8. Be sure you have a succession plan**, including knowledge-saving steps. For example, arrange meetings between incoming and outgoing staff. Ask the incoming employee to take notes and write up the

results. Preserve these meetings on video or audiotape.

**9. Bring the generations together.** Whenever you give people from different generations the chance to communicate and work together, everyone benefits. Mix generations on your board, when you form teams, and whenever you draw people together. It's the most straightforward and useful way of all to keep essential wisdom from being lost.

**10. Form alliances.** Strategic alliances let you pool resources and share risks with other organizations.<sup>3</sup> Collaborating with other groups provides a greater reservoir of people from whom you can glean knowledge as well as a cache of people to help gather and preserve that knowledge.

For instance, five years ago, a child welfare agency in the Midwest realized that 63% of its workforce would reach retirement age in three years. The agency devel-

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oped partnerships with area colleges to recruit interns in the areas of administration, social work, and technology. The interns were partnered with staff members to evaluate their systems, processes, policies, filing systems, and hardware and software capabilities. The boomers described how daily work activities were performed, and the interns recorded it all. When the boomers began retiring and a new generation joined the organization, important knowledge had already been preserved, and the transition was seamless. ■

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## Footnotes

<sup>1</sup>Canton, James, *The Extreme Future* E. P. Dutton, Penguin Group, [www.penguin.com](http://www.penguin.com).

<sup>2</sup>Brinckerhoff, Peter, *Generations: The Challenge of a Lifetime for Your Nonprofit*, Fieldstone Alliance, available at a discount at [www.snpo.org](http://www.snpo.org).

<sup>3</sup>Campbell, David, "High-End Strategic Alliances as Fundraising Opportunities," *Nonprofit World*, 19(5) ([www.snpo.org](http://www.snpo.org)); "Strategic Restructuring Partnership Options for Nonprofit Organizations," *The Strategic Solutions Project* ([www.lapiana.org](http://www.lapiana.org)); "Alliance Management Professional Development Guide" ([www.strategic-alliances.org](http://www.strategic-alliances.org)).



## Welcome to the Future

Here are some wisdom enablers for the future, available free at [www.snpo.org/members](http://www.snpo.org/members):

**Collaboration and Leadership: Secrets of Success** (Vol. 24, No. 1)

**Advance to the Future or Retreat to the Familiar?** (Vol. 22, No. 6)

**Zen and the Art of Team Building** (Vol. 20, No. 1)

**How to Partner for Success** (Vol. 24, No. 6)

**Four Keys to a Professional Mentoring Program** (Vol. 22, No. 5)

**In Search of the White Knight: Finding the Perfect Consultant** (Vol. 17, No. 6)

**Why Predict the Future?** (Vol. 19, No. 3)

**Planning for Leadership Succession: Are You Ready?** (Vol. 22, No. 4)

**Learning Institute Online Program: Strategic Alliances** ([www.snpo.org/lino](http://www.snpo.org/lino))