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SAFETY LEADERSHIP

The Tribal Knowledge of Safety

The potential loss of knowledge and experience should be a major consideration in ongoing strategy and training.

Terry L. Mathis | Dec 14, 2018

I was interviewing two employees during a safety assessment for a midstream petrochemical company. One employee was obviously older and the other was quite young. I asked the older gentleman what his major concern was for safety in his job and he responded that he had worked accident-free for 30 years and was retiring in three months. His job was to oversee contractors constructing new pipelines for the

company, so he had little exposure to job-related risks. I asked the younger man about his major concerns and he replied that he would be assuming the job of the older man in three months and felt grossly underqualified. He had been paired with his older counterpart in an effort to pass along the knowledge of the job, but the pairing had only been done recently.

The knowledge that is passed down verbally to the next generations is often referred to as “tribal knowledge.” This practice is not reserved for primitive humans only. Many companies and families tell stories repeatedly to ensure certain information and context does not die out when the next generation takes the lead. Such practices perpetuate culture as well as information. Commonalities among the group are reinforced and capabilities are passed down. Often the information in these stories is not written down or otherwise documented. Losing tribal knowledge can be devastating in many ways.

Today, many organizations have a workforce composed largely of older workers approaching retirement. These workers know things about the organization that are often not documented. Even if they are captured in rules or procedures, the context and details of them are often enriched by the knowledge of older workers who have witnessed firsthand how things work and how they can go wrong.

This potential loss of tribal knowledge is exacerbated when the gap between older workers and newer workers is too great. Many workforces were filled for many years with one generation of workers and there were no openings for new hires until the oldest started retiring. In one of my client’s workforce, the majority of the workers will retire within the next three years. The average tenure of the organization will go from 27 years to 5 years. The loss of knowledge and experience should be a major consideration in ongoing strategy and training.

Another complication to this issue is the propensity of some organizations to hasten the departure of older, higher-paid employees so they can hire new, less expensive talent. A number of our clients have early-retirement packages for employees with certain age or tenure and they can make a financial case for the practice. What they

ignore is this loss of tribal knowledge and experience. They are diminishing payroll and bringing on talent for the future, but at the same time, they are reducing the knowledge and skill base of the organization.

One reason this is a blind spot for many executives who set organizational strategy is that knowledge and skills are not measured. Lacking a metric to warn them of dangerously low organizational skill, they focus on what they do measure, such as payroll expense. We have been called in to explain why production has decreased and accidents have increased in several organizations, and have found the culprit to be this diminished capacity due to the loss of older, more tenured workers. We have recommended several specific ways to avoid this problem or to manage it after it has occurred. But there are two basic approaches that have been the most applicable and effective for most organizations.

From Age to Age

The optimal time to intervene is before the loss of tribal knowledge happens, if the problem is anticipated long enough before it becomes critical. We have found an alarming number of facilities that have inadequate or completely missing operations manuals. Others operate well but have not documented routine and/or preventative maintenance schedules. Deliverers of safety or other training have retired without leaving anything behind for their replacements. Supervisors retire without briefing replacements on the culture and nature of the employee team and what has worked well in supervising them. Even HR professionals who are good at documenting employee issues sometimes fail to pass along the critical knowledge and insight that is not captured in documentation.

Plans can be made to have key personnel become aware of the tribal knowledge that needs to be passed down and begin to either document it or communicate it through mentoring or training to the next generation taking their place. Remember that verbal passing of information must be multi-generational. The receivers of the information should be prompted to pass it along to the generation following them and possibly to others as well.

In some of our client organizations, we have made the key stories and skillsets a part of new-employee orientation, so the information precedes the need for it in the workplace. In other organizations it has been included in specific skills training modules. Clients with video capabilities have collected key sound bites from retiring employees and made them a part of training for new employees. This practice both passes on the information and maintains cultural norms.

Damage Control

After turnover has lowered the average tenure, the approach should focus on damage control. Some key personnel from the already retired ranks can often be hired part-time as consultants or trainers and return the most important tribal knowledge to the organization. The lost opportunities for older workers to mentor newer workers is at least somewhat restored this way. Many organizations pair up former leaders with new leaders as well as old and new workers. Knowledge of the success or failure of past initiatives and strategies can be of great value as well.

Organizations that undervalue their tribal knowledge often do so to their own detriment. When you see people exiting, ask yourself what knowledge and skills they are taking with them and how you can capture it.

Terry Mathis, founder and CEO of ProAct Safety , has served as a consultant and advisor for top organizations the world over. A respected strategist and thought leader in the industry, Mathis has authored five books, numerous articles and blogs. EHS Today has named him one of the “50 People Who Most Influenced EHS” four times. He can be reached at info@proactsafety.com or 800-395-1347.

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