Original Article

Generative Knowledge Interviewing: A method for knowledge transfer and talent management at the University of Michigan

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ABSTRACT **Experts and leaders within most fields possess knowledge that is largely tacit and unconscious in nature. The leaders of most organizations do not 'know what they know' and cannot share their knowledge with others. The loss of this essential knowledge is of major concern to organizations. This study tested an innovative method of tacit knowledge retrieval known as Generative Knowledge Interviewing with a small group of fund-raising experts at the University of Michigan. The results demonstrated that the tacit knowledge of a retiring leader could be successfully retrieved, documented and fully transferred to new leaders in several interview sessions. It illustrates how visionary leaders and managers within the fund-raising organization now use both the expert knowledge and the knowledge retrieval method to enhance talent management efforts from upper level management to interns in the nationally-recognized and award-winning Development Summer Internship Program. The findings of this study are applicable to leadership development as well as knowledge and talent management efforts within and beyond higher education.**

INTRODUCTION

Higher education institutions in the United States are becoming more dependent upon philanthropy and fund-raising for survival. As federal, state and local budgets continue to decrease, institutions must increasingly seek resources from individuals,

corporations and foundations. However, despite the growing need for talented fund-raising professionals, there is not a professional pipeline to address this need. Thus, institutions struggle to fill fund-raising positions with talented and qualified people (Kelly, 1998). One reason for this gap is that the field as a whole is in the process of becoming formalized (Bornstein, 2003). Even though professionals (typically with advanced degrees) have been doing this work for decades, there is not yet a body of formal knowledge to guide this work, 'The field still lacks an academic home with an established core of scholars …' (Kelly, 2002, pp. 45–46). The contributions these professionals make to institutions is in the process of becoming more recognized:

> development officers play a critical role … by helping higher education institutions adapt to a new culture, by recognizing the challenges for accountability and public perception, and by facilitating change through positions of advocacy within institutions and through a commitment to values-driven work ….
> (Strickland, 2007, p. 114)

This lack of knowledge is compounded as current fund-raising experts have developed their knowledge almost entirely through informal 'on-the-job' learning. The result is the experts and leaders in this field possess knowledge that is almost entirely tacit and therefore unconscious in nature: most talented fund-raisers *literally do not know what they know, and cannot share it with others*. Although expertise in all fields is largely tacit,

the lack of explicit (formal) knowledge in the field of fund-raising means that the 'know-how' needed to do this work may be particularly difficult to identify or share (Nonaka and Takeuchi, 1995).

This ethnographic case study, carried out with senior leaders in a successful fund-raising organization within the University of Michigan (UM), begins to address these issues. The purpose of this study was to test a recently developed method of tacit knowledge retrieval with a group of successful fund-raising leaders and experts within the UM Office of University Development (OUD), and explore if this tacit knowledge could be used to benefit the organization. The need for this study emerged out of a set of challenging circumstances: a well-respected, 'legendary' senior leader/major gift officer was getting ready to retire. And, even though two accomplished leaders/gift officers had been hired to take her place (as well as the work of another recently departed leader), the nature of this extraordinary leader's work remained elusive – even though efforts to support cross-training and sharing of expertise had been in place for several months.

The dilemma the OUD leadership team faced is increasingly common within both corporate and non-profit organizations. Research shows it can take up to two years for senior managers and leaders to acquire the tacit knowledge needed to successfully carry-out their roles (Nonaka & Takeuchi, 1995). Thus, the costs associated with filling key leadership positions can be prohibitive (Drucker, 1993). In an effort to address OUD's knowledge transfer (KT) needs, this

study sought to: (1) test and refine a method of tacit knowledge retrieval, verification and transfer known as Generative Knowledge Interviewing (Peet, 2010) with several fund-raising experts and leaders; and (2) explore the impact of the KT process on the leaders and the organization as a whole.

BACKGROUND AND CONTEXT

The UM has led consistently among public universities in galvanizing private support. In 2008, the University completed a US$3.2 billion dollar capital campaign despite the state of Michigan continuing to face some of the worst economic challenges in the nation. With over 480 professionals working within the fund-raising community (of which 170 occupy fund-raising roles), personnel and training needs have increased, causing an expansion of OUD's Talent Management Services.[1] The Talent Management Team takes a holistic approach to recruiting, retention and training, which has more recently converged into the following areas: (1) creating a leadership pipeline for recruiting talented young people into the profession; (2) developing a culture of learning, knowledge-sharing and generation within OUD and the UM development community; and (3) identifying new programs to attract and retain great talent in the development community.

Appendix 1: Office of University Development Talent Management Cycle illustrates OUD's talent management approach and services.

Generative Knowledge Interviewing™ (GKI), the KT method used for this study, was developed through several years of research at

UM[2] and has since been used to surface, validate and document the tacit knowledge of faculty, staff, students and leaders within a number of schools, colleges and units on campus (Mportfolio Status Report, 2009). Using the GKI methods, the researcher/interviewer prompts interviewees to tell stories about specific learning, work and/or life experiences (the types of stories depend upon the purpose of the GKI). From these stories, the researcher identifies an initial set of patterns and themes that reflect the interviewee's tacit knowledge. Through a verification process, these initial patterns and themes are shared and validated with the interviewee, and then tested against additional stories (Peet, 2010). An assumption underlying the GKI method is that each individual's tacit knowledge is a reflection of how their backgrounds, identities, instincts, capacities, and so on shape both their interpretations of, and their responses to, the world around them (Peet, 2010).

In late 2007, an OUD leader approached the creator of GKI with a request to experiment with the method in order to identify a retiring leader's tacit knowledge, and then seeing if it could be transferred to two new leaders who were taking over various aspects of her work. In addition to these three leaders, four more OUD leaders and managers involved in talent management learned the basic principles of GKI and participated in this study.

LITERATURE REVIEW

The term 'tacit knowledge' refers to the fact that 'we know more than we can tell …' (Polanyi, 1966, p. 4). Polanyi

believes tacit knowledge is the very essence of understanding. Nonaka and Takeuchi (1995) refer to it as unconscious and subjective 'insights, intuitions, and hunches' that have two dimensions: (1) technical 'know-how' – the knowledge needed to do something, and (2) an interpretive or cognitive dimension that generates how people see the world – our frames of reference, assumptions, beliefs, and so on (p. 8). Eraut (2000) asserts tacit knowledge is the outcome of implicit learning, 'if a situation demands rapid action or is too complex to be analyzed fully, tacit knowledge is the only available solution …' (Eraut, 2000, p. 14). He believes tacit knowledge is created within specific contexts and can be discovered through inquiry into our daily interactions, asking what we have 'acquired through the process of socialization …' in the various contexts that shape our lives (Eraut, 2000, p. 19).

Several studies have shown that although tacit knowledge is essential to the 'knowledge work' of organizations (Drucker, 1991), it is 'not easily visible and expressible. [It] is … hard to formalize … difficult to communicate …' (Nonaka and Takeuchi, 1995, p. 8). The term 'knowledge transfer' (KT) loosely refers to a complex process of retrieving and formalizing the tacit knowledge that exists within people and organizations (Nonaka and Takeuchi, 1995). Drucker argues that since knowledge is the most valuable resource within any organization, leaders need a knowledge management strategy to guide this resource (Drucker, 1991).

Additional studies have explored the topic of KT for competitive advantage (Arikan, 2009; Criscuolo et al, 2009;

Davis, 2009; Lichtenthaler, 2009). Nonaka and Takeuchi (1995) note that the Western approach to KT, which they see as focused largely on explicit knowledge, is misguided. They make a compelling case that Japanese auto makers have a competitive advantage in relation to their US counterparts because the former are much better than the latter at converting tacit to explicit knowledge, and then using it to create innovations in the work place (Nonaka and Takeuchi, 1995).

Literature on the practices and processes needed for successful KT within organizations is limited. Most case studies focus on information systems, and how to use technology for limited transfer activities (Stenmark, 2000). Although some studies refer to other disciplines, such as law or film (Sternberg and Horvath, 1999; Alony et al, 2007), these are rare. Various studies have shown in order to manage tacit knowledge, leaders need to enable knowledge sharing by fostering good relations, conversations, and the 'free-flow' of ideas and questions (Von Krogh et al, 2000). More recently, several authors have asserted that storytelling, with a focus on context and experience, is an effective way to transfer tacit knowledge (Von Krogh et al, 2000; Denning, 2001).

Even though practitioners tend to agree with the theory and research mentioned above, they note there is very little known in terms of *how to effectively identify, formalize and transfer tacit knowledge* (through storytelling or other methods). According to Horvath, 'if we are to advance the solutions to … knowledge elicitation, transfer, and measurement,

then we need to get beyond the "hand waving" that characterizes … discussions of tacit knowledge … we must know more about [it] … other than that it is critical and ineffable' (Horvath, 1999, p. x).

To date, there are no studies addressing the transfer of tacit knowledge within non-profit organizations or the fund-raising profession. Finding ways to identify and transfer the tacit knowledge of experts and leaders in this profession could benefit the field as a whole.

RESEARCH METHODS AND THE KNOWLEDGE RETRIEVAL PROCESS

Overview of approach and methods

Qualitative research utilizes different approaches and methods (Lincoln and Guba, 1994), depending on the purpose of the study. The ethnomethodological approach used here is interpretive in nature. It is premised on an assumption that people generate their realities both 'from within' – through the tacit and unconscious 'interpretive schemas' (the unconscious frames of reference, criteria and perspectives that shape how they perceive); and 'from without' – through the different cultural, social, economic and institutional forces that influence and shape their lives (Holstein and Gubrium, 1994). This approach explores peoples' accounts (stories) of how they understand and respond to the 'unfolding features of social settings' (Holstein and Gubrium, 1994, p. 265). The GKI method, which uses stories to uncover how people understand and respond to specific roles and contexts, is ideal for this approach.

Participants

The organizational context and participants for this study were a convenience sample. Of the seven participants, all were women; six were white and one was an African-American. Their roles within OUD and the stages of research in which they participated are described below:

- *Retiring OUD Leader & Senior Gift Officer* (*stages 1 and 2*) legendary Major Gift Officer & Leader; member of OUD senior management and strategy team for over 20 years.
- *New OUD Leader & Senior Gift Officer* (*stages 1 and 2*) inherited retiring leader's responsibilities and those of another person and managing many other fund-raisers.
- *New OUD Leader & Senior Gift Officer* (*stages 1 and 2*) inherited some of retiring leader's responsibilities, and focusing on leadership gifts and strategy.
- *Talent Management Leader* (*stages 1, 2 and 3*) responsible for creating an integrated and comprehensive learning culture for UM development.
- *Professional Pipeline and Student Philanthropy Leader* (*stage 3*) responsible for addressing pipeline issues, directing a nationally-recognized internship program and philanthropic education and outreach initiatives.
- *OUD Leader for Strategy, Financial & Talent Management* (*stage 3*) responsible for strategy for talent and financial management, as well as development services for campus.
- *Philanthropy Scholar & Educator* (*stage 3*) created philanthropy curriculum for summer internship program and content for new UM philanthropy and fund-raising curriculum.

Stages of data collection and analysis

The methods of data collection and analysis occurred in three stages:

- *Stage 1: Knowledge retrieval interviews and initial documentation of tacit knowledge*
- *Stage 2: Verification interviews and validation of tacit knowledge documentation*
- *Stage 3: Follow-up interviews with senior leaders and managers*

The researcher utilized various strategies to ensure internal validity within each stage; these included: (1) member checking – having subjects verify the researcher's findings; (2) inter-rater reliability – engaging several people in a comparative analysis of the data in order to generate distinct criteria for each theme; and (3) the methods of constant comparison – refining initial themes by comparing them to different and more complex data throughout the process of analysis (Glaser and Strauss, 1967; Lincoln and Guba, 1994). The use of these strategies is detailed below.

Stage 1: Knowledge retrieval interviews and initial documentation of tacit knowledge

This stage included 2 two-hour GKIs scheduled two weeks apart with the three OUD senior leaders and the Talent Management Lead. During the two GKIs, the researcher prompted the retiring leader to tell a series of stories about different areas of her work (for example, with donors, deans and other OUD staff), prompting her to describe the context and sequence of her experiences in detail:

things noticed, decisions made (and why), challenges faced, 'a-ha' moments experienced, and so on. During this stage, the new leaders asked some questions, but primarily listened.

During these interviews, the researcher engaged in a form of 'generative' listening intended to identify the unique patterns, themes, capacities, and so on that were embedded within the leader's stories, *but not actually spoken*.[3] Toward the end of each interview, the researcher shared a few of these initial patterns/themes with the leaders and solicited feedback. All three leaders responded affirmatively, 'Yes, that is right on ... I never thought about it before, but that is exactly what we do ...' Immediately following these interviews, the researcher and Talent Manager Lead compared detailed notes (often with verbatim quotes), to resolve any discrepancies. Within a week of each interview, the researcher wrote an initial 'Core Capacities' document which outlined and described the tacit decisions, values, insights, frames of reference and so on that formed the basis of the retiring leader's stories. This document was sent to the Talent Management Leader for feedback and then to the three Senior Leaders for review.

Stage 2: Verification interviews and validation of tacit knowledge documentation

In this stage, the researcher focused on triangulating the retiring leader's stories with those of the new leaders, and the content of the Core Capacities document. This required two more GKIs with increasing participation of the new leaders. The third GKI (the first of this stage) was used as

a method of constant comparison, a validation strategy widely used in qualitative analysis (Glaser and Strauss, 1967). The leaders were asked to tell stories about their work and address topics not discussed previously in order to see if the Core Capacities were relevant to the new stories. When disconnections emerged, an existing capacity was changed and/or a new one created with input from the leaders. Data saturation and analytic validation (Glaser and Strauss, 1967) occurred by the end of the third interview: the leaders agreed that they could not think of any stories that would either change or disprove the content of the core capacities document.

The fourth (final) interview was dedicated to completing the verification and transfer process with the new leaders. The retiring leader did not attend. The leaders were prompted to tell stories that helped them to personally identify with, relate to, and apply the tacit knowledge represented the core capacity document to their work. The researcher used these stories to insure the language of the document reflected the words and experiences of all three leaders. Finally, in order to further reinforce the transfer process, the researcher prompted the two leaders to tell stories of how the core capacities related to their lives outside of work. At the end of the fourth interview, the leaders decided the KT process was complete.

Stage 3: Follow-up interviews with senior leaders and managers
This stage consisted of follow-up interviews with the two new leaders involved in the initial KT process and four other OUD leaders and

mangers who were in the process of adopting either the core capacities or the GKI methods into their work (the retiring leader did not participate in this phase). These semi-structured interviews (not GKIs) were focused on understanding the leader or managers' role in the organization, their understanding of the core capacities and the GKI methods, how and why they were already using and/or intending to use these in their work, and the expected impact of their efforts. Interviews were then transcribed and analyzed using the methods of inter-rater reliability and constant comparison (methods described in previous steps).

RESULTS
This section presents results from multiple analyses of the data, including the new leaders' views of the KT process, an overview of the core capacities, and a description of how leaders/managers are using the Core Capacities document and GKI methods in OUD.

Leaders' views of the KT process
At the end of the fourth GKI, the new leaders reported the process had helped them understand what they needed to know in order to carry-out their roles successfully, and they no longer needed to continue with the KT process. When asked to reflect on the process overall, the three leaders attributed its success to several factors. The process:

Demystified the work: the new leaders reported that the interview process revealed how the retiring leader worked and helped them

value the knowledge inherent in their experiences

> The process demystified her [the retiring leader] and helped me see what I was doing and where I was heading … I could see myself in her stories and examples … The process made this legend seem more real.

Identified their own skills: the KT process helped the new leaders make connections between the retiring leader's stories and how their own skills could be applied to the same situations:

> I could see her [the retiring leader's] outcomes … but I couldn't really see how she got there … how it happened was mysterious … In hearing the stories, I realized she was just using the classic steps … the same ones I use, we just do it differently …

> I was listening to [the retiring leader's] stories and realized that I would have handled the situation differently … and it would have been just fine … Now that I can see how she was doing it, I can see how I can do it too … even if it is different

Gained confidence: it seems that participating in the interview process made the new leaders aware of their adaptive capacities, which in turn gave them a sense of confidence early on:

> A few weeks into the [knowledge retrieval process], I took the document with me on a trip with donors … I spent time reading it everyday … imagining how I embody the capacities … It

reminded me that even though I am new to this role, I really do know this work …

> I think the process gave us some confidence early on … allowed us to take risks, to ask questions, to do things a lot sooner than we would have otherwise …

> It helped me realize I don't always need to have all the answers … I can just trust my instincts

Supported trust and dialogue: the leaders also reported that the KT process facilitated a level of dialogue and trust that they can see as relevant to their work in various ways:

> it gave us chance to become really comfortable with each other … to develop a deeper level of trust … We now talk about anything … We've had several really hard but necessary conversations … those wouldn't have happened without this basic trust between us

> I think this would be a really great way to build better trust and connections with donors … We know they give for reasons that are deeply personal to them but they can't always articulate the depth of those reasons … It's nice to know why we do what we do

The Core Capacities

The term 'capacity' as it is used here refers to a set of principles and behaviors that indicate someone is working at a high level within a particular context. These Core Capacities reflect the simultaneous expression of several difficult and nuanced behavioral competencies

occurring all at the same time – an ability that distinguishes experts from novices. An overview of the themes described in the Core Capacities of the three senior leaders are below:

Embodying Self-Discipline, Integrity, and Confidence
expertise does not come from knowing everything; it comes from leading with integrity and curiosity … getting information to the right people … owning mistakes …

Creating Sightlines of Possibility
seeing each interaction as a single step in building a life-long relationship with the donor … treating relationships as fluid, emergent … having a vision of how a gift is evolving

Surfacing Donor's Passions, Needs and Interests
helping donors explore how their passions and interests can translate into gifts ..listening deeply to all that is spoken and unspoken … uncovering sources of inspiration

Leading People towards Balance and a Common Goal
always looking for common ground … creating balance between acknowledging things achieved, and those needing to be addressed … being centered when addressing conflict

Focusing on Strengths and Possibilities
seeing giving as an opportunity for people to make a difference, to express the best of their intentions and passions, and to experience themselves as part of history

Developing Adaptive Expertise and Reflective Practices
willing to ask questions … learn from others … power in being flexible and adaptive … practicing reflection on a moment-to-moment basis … asking, 'how can I improve?'

Dissemination of expert tacit knowledge and GKI methods

The leaders and managers who participated in this study are now using the core capacities and/or the GKI methods in areas of work go that beyond the initial KT process. The outcomes generated from the KT process have exceeded their initial expectations:

At first we were just exploring if it was possible to do knowledge transfer with the senior leaders; we didn't expect this [the KT process] to lead to so many other things. We are using it in many areas: recruitment, retention, training, mentoring … with donors

The use of the core capacities and/or GKI methods in different areas is described below:

Strengthening the Pipeline to the Profession: The Development Summer Internship Program (D-SIP), created in 2007, is developing a pipeline for the fund-raising profession at UM. This nationally recognized program won the 2010 Detroit Crain's Nonprofit Employer of the Year award for the state of Michigan and CASE's 2008 Grand Gold and Gold Circle of Excellence Award for fundraising and collaborative programs, respectively. Currently, seven institutions of higher education have created programs

modeled after D-SIP. Of the 65 interns who've completed D-SIP and graduated from UM, 21 are working in the profession. The director used the Core Capacities document to make changes to the intern selection process, focusing more on identifying students who possess a sense of curiosity and inquiry, rather than just a high degree of competency. The director also integrated principles of GKI into the training of coaches who provide feedback to interns' work. As a result of these (and other) changes, supervisors made more successful hiring decisions based on Core Capacities and the interns gave more positive feedback about the program overall.

Improving the selection and hiring process for major gift officers – the Core Capacities have been infused into several steps associated with the recruitment and hiring of UM gift officers. This includes everything from using GKI techniques during the recruitment process (to surface the potential candidates primary interests and capacities), to changing the types of questions managers ask during a formal employment interview.

Improving mentoring for existing fund-raising professionals – a new UM Development community mentoring program is training mentors in GKI. The focus is on strategic questioning and listening in order to encourage deeper reflection in the mentees to help them better understand their own capacities. Depending on their needs, mentees may also be trained in GKI as well.

Creating a formal philanthropy and fund-raising curriculum for the

university: The Michigan Philanthropy Academy, created early in 2009, provides a fund-raising curriculum specific to UM. The first curriculum, focusing on Major Gift Officers, was built upon the Core Capacities. Future curricula (for Program Managers, Deans, & Directors) will continue to build on these capacities.

Helping donors identify why they give – three donors were asked to participate in a GKI to see if the methodology could be used to reveal the tacit assumptions and values that underlie their giving. All three responded positively. One reported that the interview was a 'profound' experience, 'I have been giving for many years to different places … but I had no idea how much my giving was a reflection of me, of what I deeply love and value …'. This donor has since given another gift to UM.

In summary, the results of this study demonstrate the following:

1. it is possible to retrieve, document and transfer the tacit knowledge of a group of experts/leaders in the fund-raising profession using the methodology of GKI;
2. a successful KT process can be accomplished in a matter of weeks (as opposed to months or years) using GKI as long as the strong commitment to talent management; and
3. the Core Capacities derived from a GKI can be used to align HR and business practices, saving considerable resources with regards to identifying, hiring, training and mentoring talented professionals.

DISCUSSION

The goals of this study were to test the method of GKI with a group of senior fund-raising leaders/experts for the purpose of KT, and to see if, and how, that expert knowledge could be used to benefit talent management efforts. It appears that the KT process met these goals, and the research process itself exceeded the expectations of the leaders involved. Not only did KT occur within a relatively short amount of time, but several OUD leaders/managers who did not participate in the initial KT process are now using the Core Capacities and/or GKI methods to enhance various efforts within the organization. Thus, in addition to the immediate cost-savings resulting from the success of the KT process, OUD leaders are leveraging the resources generated from this study in ways that will produce benefits and savings (for example better recruitment, training and mentoring of those entering the fund-raising profession) for the organization in the future (Appendix B illustrates the impact of the KT process to date).

As the literature pointed out, the field of fund-raising has critical gaps. There is not yet a shared understanding as to the types of knowledge and skills needed for the profession, or the best ways to educate people for this work. This study demonstrated one way these gaps could be addressed. By using GKI methods to intentionally retrieve and document the 'know-how' of experts/leaders in the field, this expert knowledge can be incorporated into recruitment, training, retention and mentoring efforts of an organization.

Another implication of this study is that GKI methodology could be used for knowledge management activities in general, and KT efforts more specifically in other contexts. The fact that OUD leaders are already using GKI for talent management work that is common to other professions (for example, recruiting, hiring, training, and mentoring) is a promising indication that the method can be adapted successfully to other contexts. Given the high costs of succession management and leadership turnover, the use of GKI for transferring expert knowledge in a variety of contexts is quite promising.

Given the positive results of this study, the limitations must also be recognized. Although several findings from this study can be applied to other contexts, the results cannot be separated from the unique culture and leadership of OUD, an organization with a comprehensive talent management strategy and a team dedicated to bringing it to fruition. This includes a group of leaders and managers who are focused on excellence, integrated approaches to learning, continuous improvement, and possess the ability to identify and try new and 'emergent' methods (such as GKI) as the need arises. Furthermore, OUD leader's close relationship with research and academic units on campus (where the GKI method originated) is another unique factor of this study. Another potential limitation stems from the fact that both the participants and the researcher of this study were all women. It is not clear if or how the KT process or the use of the GKI methods would have been different with a group of men, even within the context of OUD. This concern was raised several times by the participants themselves and should be addressed in future research.

CONCLUSION AND NEXT STEPS

The results of this study will continue to inform talent management efforts at UM. The OUD Talent Management Team plans to use the Core Capacities document to establish performance descriptors for fund-raisers – to develop a common language for evaluation, recruitment and training. Team members are planning to work with the creator of GKI to establish a formal certification program for this method within the university. Within the context of the fund-raising community, the team intends to use GKI for professional development in two areas: (1) for managers who are coaching staff to develop their own knowledge, skills and approaches; and, (2) for fund-raisers to develop stronger relationships with donors by listening more intently and helping them identify the underlying values that inform their giving.

In terms of research, a systematic analysis of how GKI methods are being used for different purposes and within different contexts is needed. To date, GKI has been used in leadership development with senior staff, strategic planning with faculty, and knowledge retrieval and formative assessment with students. It is also part of the campus-wide Integrative Learning and Mportfolio program, an initiative that currently spans more than 15 different units on campus. A systematic evaluation of the use of GKI in these contexts would clarify the efficacy of this method for a wide array of learning and knowledge management purposes.

NOTES

1 UM Talent Management takes a strategic, comprehensive approach to identifying, evaluating, developing and leveraging the talent resources that help UM perform at its best: talent strategy and planning, recruiting, performance management, learning and development, succession planning, and leadership development.

2 This methodology evolved from educational research at UM which focused on identifying pedagogies that facilitate the development of leaders, entrepreneurs and change agents. It has been used by more than 1800 faculty, staff and students to retrieve and document tacit knowledge within themselves and each other, as well as leaders, researchers and educators within a wide range of contexts.

3 When the GKI method is practiced effectively, multiple observers will 'hear' and identify the same unspoken patterns/themes within an interviewee's stories – regardless of how the observers may or may not personally relate to the stories.

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APPENDIX A

UM office of university development talent management cycle

Talent **Acquisition** Strategy & Practices
•Recruitment Strategies, Initiatives
•Attraction; Branding of Development
Profession & Development @ UM
•Assessment and Selection
•Development Summer Intern Program;
Student Philanthropy

Talent **Transition** Strategy & Practices
•Retirement Planning
•Succession Planning
•Exit Process

Tools such as:
-Job Descriptions
-Competencies/
Performance Descriptors
-Performance Appraisals
-Leadership Assessment
-Metrics
-Generative Knowledge
Interviewing (GKI)
- Knowledge Transfer

Talent **Retention** Strategy & Practices
•Staffing & Resource strategies
•Retention Strategies/ "Great Place to Work"
•Total Compensation Strategies
•Management Consulting & Employee Relations
•Team Building
•Career Planning & Career Management

Talent **Development** Strategy & Practices
•On-boarding Strategies, Initiatives and Activities
•Skill & Knowledge Building
•Learning Culture
•Leadership Development
•Performance Evaluation & Expectation Setting

APPENDIX B

Impact timeline of the knowledge transfer process with oud leaders

Appendix B: Impact Timeline of the Knowledge Transfer Process with OUD leaders