
KTAP, Day 1

— Knowledge Transfer —

Today's goal

- Define Knowledge Transfer Action Plan (KTAP) as it relates to your work as a municipal clerk

Today's objectives

- Summarize IIMC criteria for CMC certification
- Define knowledge transfer and set clear goals for its implementation in municipal operations
- Identify key knowledge holders and establish goals for capturing and transferring their knowledge

MC-INGO

Collect the names and email addresses of 6 of your peers by identifying 1 person who matches each of these squares (i.e., 1 person = 1 square)

| | | |
|---|--|--|
| Has been a clerk for less than 1 year | Has recorded council meeting minutes | Performs regular financial duties (e.g, reviewing expenditures, balancing budgets) |
| Has held other jobs in municipal government | Has government experience <i>outside</i> of Illinois | Has organized 2 or more municipal elections |

IIMC curriculum guidelines

CMC EDUCATION POINT REQUIREMENTS

- Certified Municipal Clerk (CMC) designation
- IIMC membership must be current
- Must be an active member of IIMC for two years
- Must earn 60 education points and 50 experience points
- Each year of Institute is 40 hours or 20 points
- Must complete KTAP assessment in order to earn certification letter

Sixty (60) Education Points Required (Regions I-IX)

Options for obtaining the sixty (60) Education points required may come from any combination of the following categories:

| Option | Eligible Points |
|--|--|
| 1) Completion of an IIMC-approved Institute or Academy program | 1 point per 2 educational hours (120 hours = 60 points) |
| 2) A bachelor's degree or higher in Public Administration or a related field* | 20 points |
| 3) A bachelor's degree or higher in an unrelated field* | 10 points |
| 4) An associate degree | 5 points |
| 5) Completion of a State/ National/ Provincial education program approved through the IIMC course review process | 1 point per 4 educational hours with a completed learning assessment |
| 6) IIMC Annual Conference** | 1 point per 1 educational session with a completed learning assessment |
| 7) IIMC Athenian Leadership Dialogue*** | 3 points each with completed learning assessment, 18 points maximum |
| 8) IIMC Online programs | 1 point per 2 educational hours |
| 9) IIMC Study Abroad Program | Points vary by program |

* Copies of official transcripts are required.

**Members may use IIMC Annual Conference educational hours for either education or experience points.

*** Members may apply a maximum of 18 points to the CMC designation.

Knowledge transfer

- Sharing, communicating, and disseminating knowledge, expertise, and skills from one individual, team, or department to another within an organization
- Explicit knowledge (e.g., documented procedures, manuals, and policies)
- Implicit or tacit knowledge (e.g., personal experiences, insights, and know-how)
- Goals are to preserve critical information, ensure operational continuity, foster innovation, and improve decision-making

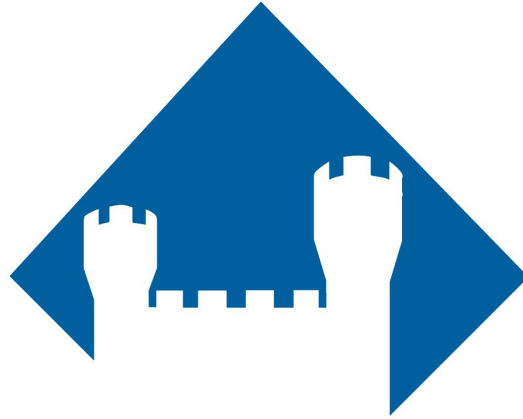


Public Domain Image CC0 1.0 Universal

Identifying critical knowledge

- Divide into small groups. One person will be the “recorder” of the group’s notes.
- Each group will identify critical areas of knowledge that are essential to their roles as municipal clerks (e.g., legal procedures, council meeting protocols, public records management, or communication with constituents).
- Write down 10-15 pieces of key knowledge.
- Compare results.

What is one area of knowledge in your current role that you lack?



**SCHOOL OF
EXTENDED
LEARNING**

EASTERN ILLINOIS UNIVERSITY™

KTAP, Day 2

— Goal-Setting —

Today's goal

- Isolate individual areas of strength *and* areas for improvement related to your daily work as a municipal clerk

Today's objectives

- Map critical knowledge areas and identify gaps in knowledge
- Conduct self-reflection
- Develop short and long-term goals for creating a knowledge map and choosing transfer strategies

Think, Pair, Share

- **Question:** What information did you learn yesterday that you want to further explore?
- **Think:** Take a few minutes to journal your thoughts
- **Pair:** Turn to a partner and discuss your answers
- **Share:** Report out your understanding of *someone else's answer*



Public Domain Image CC0 1.0 Universal

Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis

- Corporate analysis tool to help organizations understand what they do well *now*, where there are weaknesses, and where there exists potential opportunities and threats
- Considers both internal and external factors
- Helps you decide what you *can* and *cannot* control
- Helps you challenge assumptions you may have

SWOT analysis (cont.)

STRENGTHS: What do you do well? What unique resources can you draw on? What do others see as your strengths?

WEAKNESSES: What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?

OPPORTUNITIES: What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?

THREATS: What threats could harm you? What is your competition doing? What threats do your weaknesses expose to you?

S.M.A.R.T. Goals

- Specific
- Measurable
- Attainable
- Relevant
- Time-bound



S.M.A.R.T. Goals

- A document to help you plan how to achieve your goal(s)
- A method of “chunking” your progress
- A way to outline and manage benchmarks
- A tool which may be applied to both personal and professional contexts

S.M.A.R.T. Goals (cont.)

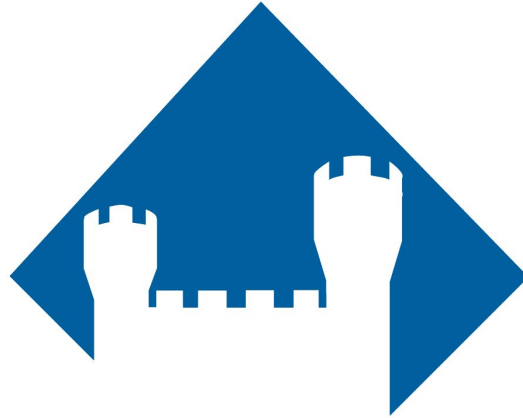
- Identify your guiding values
- Identify outcomes of achieving your goal(s)
- Identify how you will measure your progress
- Give yourself ample time (but set a deadline)
- Use action verbs

DUMMY S.M.A.R.T. Goals

- I will get a college degree
- Earn more money in my job
- Finish my projects at home by Monday
- Read at least five sci-fi novels by the end of the year

SMARTY PANTS S.M.A.R.T. Goals

- By the end of the fiscal year, create a how-to document of our purchasing process that can be used by new employees
- Determine a new organization method for filing our 2024 personnel folders that adheres to the department's record retention policy



**SCHOOL OF
EXTENDED
LEARNING**

EASTERN ILLINOIS UNIVERSITY™

KTAP, Day 3

— Goal Refinement —

Today's goal

- Determine three goals you need to achieve by the end of Institute

Today's objectives

- Identify and set goals that enhance knowledge transfer
- Document action plans with clear goals for implementation and usage

S.M.A.R.T. Goals

- Specific
- Measurable
- Attainable
- Relevant
- Time-bound



S.M.A.R.T. Goals activity

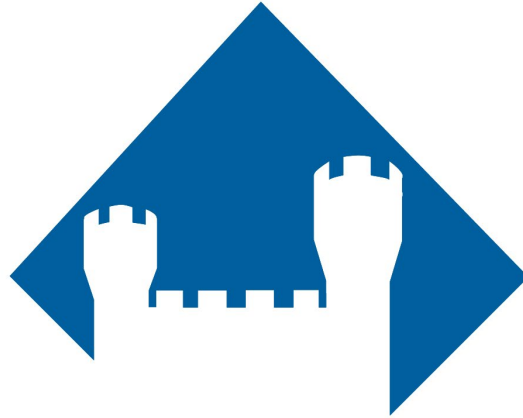
- Divide into small groups (3-5 people per group). Designate a recorder and a group representative. Each group will work together to create a S.M.A.R.T. goal related to a common municipal responsibility, such as improving public records access, streamlining meeting management, or enhancing communication with residents.
- Groups are assigned to 1 of the 3 following scenarios:
 - "Your city council has asked you to improve the accessibility of meeting minutes and agendas. Set a goal to streamline the process for uploading and organizing these documents for public access."
 - "Your department needs to improve voter registration outreach for the next election cycle. Set a goal to enhance the process and increase registrations by 10%."
 - "Your municipal office is transitioning from paper records to a digital system. Set a goal for the digitization and archival of essential documents."

S.M.A.R.T. Goals activity (cont.)

- In 15-20 min., each group must complete the following:
 - Step 1: Define the goal by brainstorming as a group. Ensure it is specific and relevant to the assigned scenario.
 - Step 2: Identify how to make the goal measurable (e.g., by setting a target number of documents digitized or tracking the number of residents reached through outreach efforts).
 - Step 3: Assess whether the goal is achievable given available municipal resources, budget, or staff, and make adjustments if necessary.
 - Step 4: Ensure the goal is relevant to the municipal office's mission, legal requirements, or public service objectives.
 - Step 5: Set a time-bound deadline or timeline to accomplish the goal (e.g., "complete the voter registration outreach by the end of the quarter").

S.M.A.R.T. Goals activity (cont.)

- Group presentations! Please tell us the following:
 - The reasoning behind your goal(s)
 - How you have ensured your goal fits the S.M.A.R.T. criteria
 - The potential challenges you anticipate in achieving the goal (e.g., limited budget, time constraints, or staff shortages)
 - How you plan to evaluate completion of your goal (i.e., are the metrics and deadlines realistic?)
 - Is your goal aligned with legal requirements or municipal priorities?
 - Is your goal achievable with the available municipal resources?



**SCHOOL OF
EXTENDED
LEARNING**

EASTERN ILLINOIS UNIVERSITY™

KTAP, Day 4

— Managing Completion of Goals —

Today's goals

- Outline several strategies for managing the completion of your three goals

Today's objectives

- Establish a timeline for reaching your actionable goals
- Create assessment measures for the management of your SMART goals

Feedback speed dating

- Six rounds total
- Three minutes per round
- Read and respond to your partner's S.M.A.R.T. goals
- Try using the **P**(raise), **Q**(uestion), **W**(ish) method
 - What do you like about the goals?
 - What questions do you have about the goals?
 - What revisions do you wish to see concerning the goals?



Public Domain Image CC0 1.0 Universal

Timeline mapping activity

- To achieve our goals, it's important to meet deadlines...especially in the municipal context where deadlines are often tied to public expectations, legal compliance, or election cycles.
- In this activity, you will begin developing a plan to achieve the goals you've developed this week.
- All of this work can be used in your KTAP!

Timeline mapping activity (cont.)

- Choose one of your S.M.A.R.T. goals (either individual or group-based) and break it down into key tasks or milestones using the example below:

| TASK | DESCRIPTION | ASSIGNED INDIVIDUAL | COMPLETION DATE |
|-----------------|--|---------------------|-----------------|
| Collect records | Gather physical records from the last 5 years | Jane Doe | 11/1/24 |
| Scan documents | Digitize physical records | John Smith | 12/15/24 |
| Verify data | Ensure accurate digital records | Team Lead | 1/15/25 |
| Store securely | Upload and store records in the digital system | IT Department | 2/1/25 |

Timeline mapping activity (cont.)

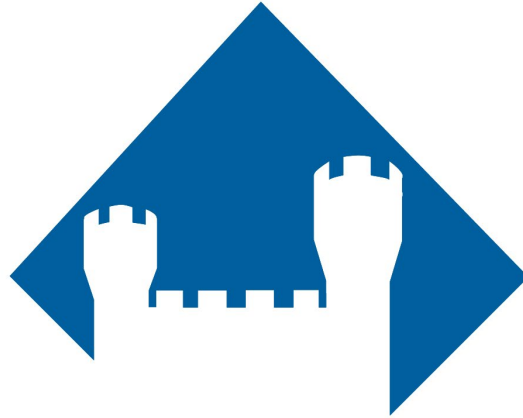
- Using your task breakdown, develop a timeline for the completion of each task using the example below:

| WEEK/MONTH | TASK | MILESTONE | RESPONSIBLE INDIVIDUAL | STATUS |
|------------|-----------------|----------------------------|------------------------|----------|
| Week 1 | Collect records | 50% of records collected | Jane Doe | On track |
| Week 3 | Scan documents | 50% of documents scanned | John Smith | On track |
| Week 6 | Verify data | 50% of data verified | Team Lead | Pending |
| Week 8 | Store securely | 100% of documents uploaded | IT Dept. | Pending |

Timeline mapping activity (cont.)

- Finally, create assessment metrics for the completion of each task using the example below:

| TASK | TARGET COMPLETION DATE | ACTUAL COMPLETION DATE | STATUS | NOTES |
|-----------------|-------------------------------|-------------------------------|---------------|---|
| Collect records | 11/1/24 | 11/2/24 | Delayed | Delay due to unavailability of some records |
| Scan documents | 12/15/24 | Pending | Delayed | Delay due to Brenda's cat having kittens |



**SCHOOL OF
EXTENDED
LEARNING**

EASTERN ILLINOIS UNIVERSITY™

KTAP, Day 5

— Building Your Network —

Today's goal

- Synthesize several ways in which you will apply what you've learned at Institute toward your work as a municipal clerk

Today's objectives

- Identify your knowledge-sharing culture
- Distinguish tools and resources you may leverage for success as a municipal clerk

Roundtable discussion

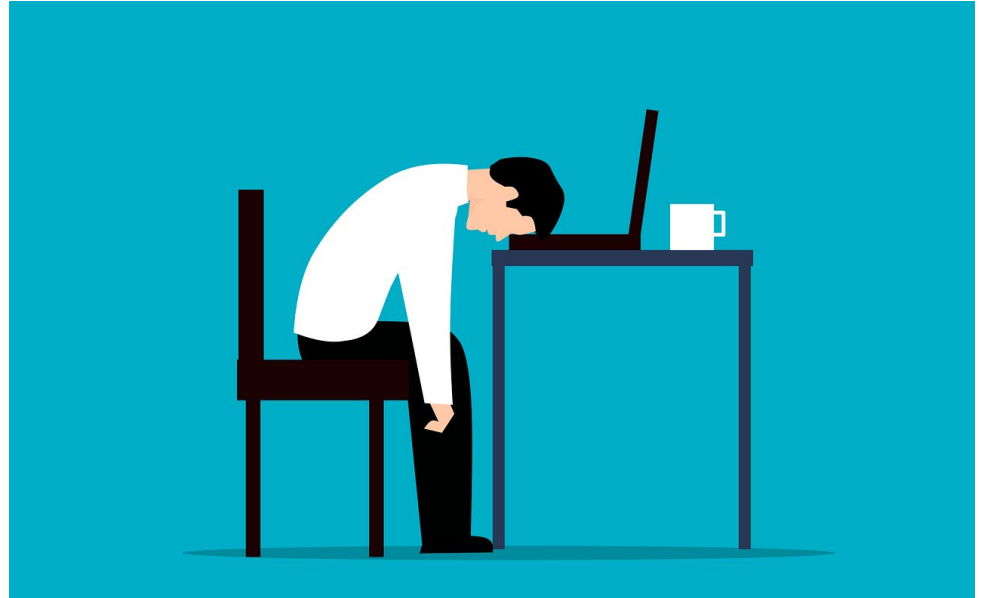
- What are some systems, tools, or strategies you will utilize to achieve your goals?
- What individuals within your office will you rely on to achieve your goals?
- What professional networking have you done this week? Who will you contact as a resource?
- Based upon your experience this week, what advice would you give incoming clerks?



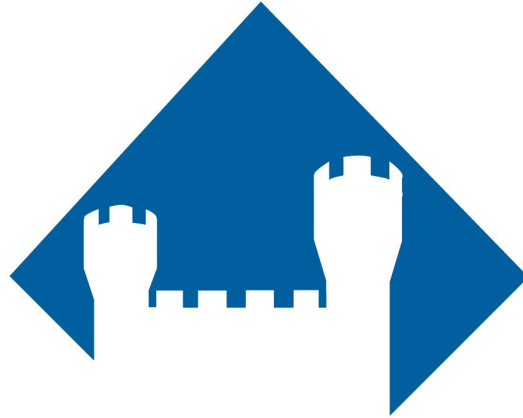
Public Domain Image CC0 1.0 Universal

KTAP assessment

Let's begin



Public Domain Image CC0 1.0 Universal



**SCHOOL OF
EXTENDED
LEARNING**

EASTERN ILLINOIS UNIVERSITY™