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LEAVING A LEGACY . . .
Using Technology to Support Your Replacement

More than one in five people in the water, wastewater and utility industry are retirement-aged, according to the U.S. Census Bureau's Center for Economic Studies.

The Bureau, as well as other organizations such as the Center for Energy Workforce Development, have been researching and reporting on this issue for the last several years. No doubt the impact on the water industry in Kansas will be felt, and those passionate about maintaining quality water and quality service feel a need to leave their beloved industry in good hands. But how?

How many rural water districts have only one bookkeeper in the office . . . who also happens to double as secretary, public relations director, the regulation compliance and complaint department, etc.? Or we've all heard the not-so-exaggerated stories of the octogenarian water operator who is the only one in town knowing the location of emergency shutoff valves. In the wake that follows an experienced employee's retirement, the very thing they have worked for might be in jeopardy unless the baton is consciously passed to the next person in a facilitated way. Leaving a legacy is more about creating a mechanism to sustain the processes that work, rather than being irreplaceable.

Fortunately now, technology can help bridge a shift in workforce whether it be due to retirements, life changes, or unexpected departures. So if you truly want to leave a legacy, start now adding some simple habits to your normal day. In very short order, you will have a thorough working, living process that serves as insurance and leaves a permanent positive mark on the momentum of your system.

Your process can consist of digital documents, screencasts, workflows, or even customized management or archival software.

A semi-retired rural water district bookkeeper once confided in me that she stayed on part time only to help train her replacement. However, she lamented that their filing system, which was confined to paper in physical filing cabinets, soon became a mess. The new office employee did not know how the system she inherited worked. Do you look under C for CCR? Or under W for Water Quality Report?

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While hard copies can be a useful backup, archiving documents digitally allows computers to search, regardless of how the document is filed. The key to making your documents indexable and searchable, irrespective of an individual's personal preference for folder structure, lies in making sure they are in fact digital. For example, digital pdfs that were created with word processing software are searchable. However, if you have a hard copy of a

inexpensive alternative is keeping a Word or Excel document with a complete list and password protecting the document. And there's nothing wrong with a hard copy list put into a lockbox. Bottom line, if you are using software solutions that require logins, you need to catalog them and give appropriate access.

While on the topic of software solutions, if you have a system that requires training to use a piece of software, or a series of steps that is customized to your needs, recording your steps is easy using screenshots or screencasts. Windows operating systems now have a tool call Snipping Tool that allows you to record a still image of your screen or part of your screen, then save as an image file. A variety of apps are available to do this as well. Instead of showing a series of images, you could opt for screencasting, which records your actions in video form as you use your computer. You can even add narration. Screencast-o-matic.com has a free app online and for download designed to capture mouse and keyboard actions, which can serve as a fantastic training tool as well.

The innate human desire to feel worthwhile contributes to "why" leaving a legacy is important, but "how" can be elusive. On-line humorist Dave Weinbaum encapsulates the essence of how: "Those who let things happen usually lose to those who make things happen."

Making it happen means you must build time into your routine to initially create as well as consistently update documenting your processes. To build it initially, follow a normal schedule while journaling everything you do. Then continually dedicate time, even if only an hour every week or every other week, to catalog, screenshot or screencast it.

Making the time to develop a habit of updating your sustained processes will save your water system time, will save your constituents money, will prevent loss, and eventually, will leave your legacy. (Oh, and maybe you can even sooner take off long enough for a real vacation?)

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document and use a scanner to archive onto your computer, you will only be able to search according to the file name. The file would be stored as an image, not as words on a page. If you have a large body of documents that will need to be searched later, make sure you save them in digital form. There is software that can optimize a pdf for text recognition but most people do not have the required professional level available.

In the spirit of not reinventing the wheel, many water districts and cities use multiple third party solutions to complete routine tasks. Usually along with these solutions come a plethora of Web site links, usernames, passwords, PINs, secret questions and more. Tracking these in a safe format while allowing access to those who need them can be a challenge. Most anti-virus and status monitoring programs such as Avast offer password vaults as a more secure alternative to saving individually in your browser. An