

Fostering Inter-Departmental Institutional Memory in the Nonprofit Sector: Borrowing Micro-Transaction Knowledge Strategies from a Successful U.S. Restaurant Chain

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The purpose of this paper is to describe practices used for knowledge storing, sharing, and gathering across a shift-based organization where narratives may not overlap among other employees. The paper uses a case study to identify nine best practices used in a successful, family-owned chain restaurant in the southern United States, and illustrate how those practices might be useful in small- and medium-sized (budgets \leq \$20M/year) nonprofit organizations. While the connection between a restaurant and a nonprofit organization may not seem readily apparent, a U.S. survey of fundraisers ($n = 580$) revealed the two industries have many traits in common. Both industries struggle with employee turnover, work with time-sensitive materials that require rapid turnaround, and act in highly competitive markets. I argue that the nonprofit sector may benefit from the procedures that this restaurant had in place to share the outcomes of their accomplishments and failures, and that a restaurant shift serves as a hyper-speed version of daily processes found in any organization, and that outcomes may be more readily observed due to the nature and number of events that occur between the business's open and close. This research begins to answer, *What might the nonprofit industry learn about knowledge management from industries that go through similar employee turnover and steep learning curves?* This paper aims to provide suggestions for handling organizational documentation amidst turnover, creating usable institutional memory, and building interpersonal trust among employees through the use of micro stories and antenarratives.

Keywords: institutional memory; nonprofit; storytelling

1. INTRODUCTION

The U.S. nonprofit industry has rapidly expanded over the past seventy years. In 1940, nonprofits numbered 12,500, quadrupling to 50,000 in 1950. Today, that number is nearly two million organizations, and accounts for as much as 10 percent of U.S. employment and nine percent of the domestic economy (Horstman, 2006). However, throughout the past decade, nonprofit organizations have been called to reengineer their funding strategies and organizational paradigms (Lettieri, Borga, & Savoldelli, 2004). As federal funding freezes and state program cuts continue reduce community resources, nonprofit organizations are called upon to fill gaps in social services for at-risk populations. Recently, nonprofits have been criticized for duplicating existing services or failing to identify best practices in similar communities. As a result, grant dollars are not leveraged effectively (Hurley & Green, 2005). One way that organizations—both nonprofit and for-profit corporations—can maximize their experiences is to assess how they manage institutional knowledge on a daily basis.

The following section will introduce the field of knowledge management in the corporate sector, restaurant and hospitality industries, and the nonprofit sector. Then, I will identify similarities between the restaurant and nonprofit sectors as they address handling employee turnover, working in a fast paced atmosphere, and bridging boundaries across multiple departments and organizational cultures. Finally, I will lay the groundwork for the rationale of the study, showing how small- to medium-sized nonprofit organizations might borrow established best practices from an industry that faces similar issues in turnover, deadlines, and competing organizational discourses.

1.1. The Field of Knowledge Management: Mining Tacit and Explicit Knowledge

“Knowledge management” (KM) is the process by which organizations “create, capture, acquire, and use knowledge to support and improve performance of the organization,” including knowledge development and transfer among employees (Hurley & Green, 2005). KM involves the acquisition, storage, retrieval, use, and production of knowledge assets of an organization (Watson, 2003).

Knowledge management has been studied most extensively in the corporate sector. Several studies have described how successful KM strategies have increased institutional memory, improved operational excellence, and maximized corporate effectiveness (Bixler, 2005; O’Dell, Grayson, & Essaides, 1998; Schorr, 2004). Other studies show that KM systems can help employees enhance sharing and collaboration strategies, identify best practices, and improve interpersonal communication (He, Qiao, & Wei, 2009). KM systems may also reduce employee turnover and training time, streamline work processes, avoid unnecessary reinvention (Battaglia, 1997; Hurley & Green, 2005; Peterson, 1993), and increase the capacity for creative capital (Blankenhorn & del Valle, 1992; Schorr, 2004).

Successful knowledge management efforts involve the systemic process of identifying and learning from past experiences. This content, or “institutional memory,” is often scattered across databases, document storage systems, and within the minds of colleagues—and creating new ways to exchange that knowledge, traditionally using electronic technologies such as intranets, networks, or knowledge bases (Bixler, 2005; O’Dell et al., 1998; Wiig, Hoog, & van der Spek, 1997). Rapid identification of the necessary information can help make organizations more competitive and respond to clients quickly and correctly, without having to reinvent a solution.

Classifying knowledge asset categories can be useful when delineating components of a corporation’s institutional memory. Ian Watson created a content taxonomy that many organizations hold, including:

1. Formalized content, such as reports, procedures, and products;
 2. Intangible know-how, such as narratives, examples, and experiences;
 3. Functioning know-how, such as procedures and chain-of-command;
 4. Cultures and customs, such as a history of interactions with clients and suppliers
- (Watson, 2003)

Much of the information that is used within this taxonomy is embedded within tacit (implied) knowledge, where individual workers may possess stories or examples within their minds. These colleagues may choose to share the tacit knowledge if they know that the information would help smooth a transaction—such as informing a new colleague about a client’s history or special needs within the corporate relationship. Making the knowledge explicit—sharing with another worker—may help another colleague save time or avoid making a mistake. Creating a way to document this information—so that others may access the content when the knowledge creator is not present—can help build a transparent corporate memory that may outlast employee turnover or facilitate departmental collaborations (Watson, 2003).

1.1.1. Using Micro-Stories to Create Institutional Memory from Implicit or Tacit Knowledge

Studies on institutional memory in the corporate sector tend to focus on the technological advances and use of technology in their studies, such as intranet and knowledge bases (Cozijn, Maes, Schackman, & Ummelen, 2007; Iverson & Burkart, 2007; Tsai & Ghoshal, 1998) However, other studies in institutional memory have suggested that any way an organization can share its narrative across members of the organization is a way to decentralize this information. Sharing narratives may help make turnover less of a problem if a storyteller happens to leave an organization (Boje, 1991, 2011; Geisler, 2001; Inc, 2015; others) For example, “exit interviews” are common practice when employees choose to leave a position (Boje, 2011). Exit interviews ask, “How would you describe working here?” “Where is the organization coming up short?” During these interviews, organizational leaders can gain insight on how to diagnose issues that lead to turnover. However, exit interviews tend to take place

too late—the employee is already out the door. Why not address these issues when they are small? Organizations can do this by creating tangible, cross-departmental micro stories, such as the 15/5 report developed 25 years ago by Patagonia’s founder, Yvon Chouinard (Inc, 2015; Schachter, 2015.; Wycoff, 2015).

1.1.2. Documenting Micro-Stories: The 15/5 Report

The concept of a 15/5 report is simple: each employee spends 15 minutes writing a weekly report that takes the manager and team members five minutes to read (Schachter, 2015; Wycoff, 2015). The report covers questions such as:

- An update on what the person worked on this week,
- A blunt description of morale and the morale they see around them,
- An idea of what could enhance the process/project
- Areas where the person could use help or new ideas

Each employee gets a copy of the others’ reports, facilitating transparency across employee roles and projects. Employees who use these reports state they feel more connected to the company (Wycoff, 2015). The reports serve as a forum for bragging, commiserating, sharing congratulations, asking for help, suggesting ideas, and venting frustrations while the issues are small and manageable. Problems can be addressed at early stages and with all team members on board, rather than becoming isolated in a single channel. Every employee’s role is valued, and team members have a good idea about what their colleagues are doing, obstacles they face, and how they meet their goals. These micro stories help create a deep layer of institutional memory, where multiple players are involved in and continually aware of the storylines. Robert Boje (1991) similarly promoted the importance of organizational narratives and storytelling, and more recently, Kristen Moore (2013) recently called for narratives and storytelling pedagogy in professional writing service learning classrooms, stating that organizational and community narratives will help writers articulate community needs and goals.

While synthesizing research on corporate and nonprofit storytelling, I recalled that the restaurant had incorporated a similar form of 15-5 report at the end of each shift, written by the shift manager. The reports were stored in a central location, accessible by any employee, and were in handwritten form, in a bound book, rather than stored on an intranet. This memory called into question the importance of electronic storage, which has been a central theme in most knowledge management studies (Cozijn et al., 2007; Iverson & Burkart, 2007), and identified similar patterns across the restaurant and nonprofit industries.

1.2. Knowledge Sharing in the Restaurant Sector

Knowledge management in the restaurant and hospitality sector has begun to receive much attention in the past several years, as small- and medium-sized enterprises (SMEs) are a vital part of any national economy (Ahrens & Chapman, 2004; Boje, Haley, & Saylor, 2015; Daskalaki, 2012; Desouza

& Awazu, 2006; Durst & Runar Edvardsson, 2012; Yew Wong, 2005). Management styles is a key component of restaurant literature, particularly the contrast between centralized and decentralized organizations (Ahrens & Chapman, 2004; Boje, 1991; Boje et al., 2015). Rather than traditional top-down, centralized organizations, many SME cultures are adopting an “enabling,” or decentralized style, where employee/staff voices are as important to the daily processes as management (Ahrens & Chapman, 2004). Decentralized organizations fit well into the KM literature, as employees make up a bulk of the institutional narrative: the mundane, daily activities that create an organization’s history. These “micro stories” of daily tasks, responses to situations, problem solving, and sharing results in the development of an organizational narrative over time. Employees gradually share tacit or implicit content with each other, discussing how they handled various situations, mirroring another’s actions, or asking questions about a task, learning in increments as they navigate their job roles.

The decentralized management model enables employees to make useful contributions to the organizational narrative, encouraging a balance of new ideas along with the established best practices (Ahrens & Chapman, 2004; Daskalaki, 2012). Boje refers to these stories as *antenarratives*: sense-making of future possibilities and problem-solving ideas that course through organizations (Boje et al., 2015). These narratives are emerging, localized, living stories that compete with other stories from within the organization, solidify into the organization’s larger storyline (or not), helping construct the identity and institutional memory of the organization. Allowing additional voices into the organizational memory can help identify trends and test long-term strategies.

Due to resource constraints within the restaurant sector, many of these narratives tend to be oral, passing on stories from one colleague to another. Much of the interaction within the restaurant industry is brief, yet frequent, allowing small interactions to build up over time into professional relationships and friendships. Socialization in any business environment is important; forming bonds with other members of the discourse community is how the learner gains advice or identifies mentors (Desouza & Awazu, 2006). Likewise, if an employee is no longer satisfied at their position or with the social bonds within their organization, they may choose to leave, taking their organizational knowledge with them. However, restaurant managers at SMEs tend to disregard employee turnover as having a negative effect on institutional memory. Small- to medium-sized nonprofit organizations, however, frequently do complain about how turnover has affected their institutional memory (Desouza & Awazu, 2006). Are there things that the nonprofit industry might be able to learn from the restaurant sector?

1.3. Knowledge Management in the U.S. Nonprofit Sector

Like the restaurant sector, the bodies of programmatic knowledge within nonprofit organizations are rarely formalized, because knowledge is divided among different people. This division makes the information less accessible to others, and is often referred to as the “silo effect” (Gilbert, 2005; O’Dell et al., 1998; Rockley, Kostur, & Manning, 2003; Schorr, 2004). The fragmentation of knowledge reduces the potential effectiveness of actions, wastes money, and makes cross-fertilization among the

ideas difficult (Lettieri et al., 2004). The organization's risk of knowledge loss is directly proportional to the knowledge held by individuals, rather than in a centralized location (Brown & Woodland, 1999). This loss can be disastrous for nonprofits, which rely on grant money and donations, yet face a high turnover rate in the fundraising field (Gunning, 2013b; Healey, Bartolini, Maehara, & Williams, 2010; Hurley & Green, 2005).

At the time of study, the study of knowledge management within the nonprofit sector was only recently gaining attention (Gilbert, 2002, 2005; Lettieri et al., 2004). The lack of research in nonprofit KM lead me to conduct a survey with 580 U.S. nonprofit proposal writers about the processes involved in developing and maintaining institutional memory (Gunning, 2013a, 2013b). The study was a follow up investigation of widespread nonprofit employee turnover and the subsequent issue of transferring implicit institutional knowledge among employees (Horstman, 2006). The 2013 survey sought to identify knowledge seeking, storing, and sharing processes used by professional proposal writers employed within the nonprofit sector.

The new study found that many nonprofit proposal writers worked as "lone writers" in their organization, and relied on asking other employees and sorting through former grants to educate themselves about their new organization. Documentation processes were not commonly in place in most nonprofit organizations, and many writers reported moving on to a new project as soon as they submitted a proposal, without formally debriefing/reflecting on the development process. However, half (52% of the 580 respondents) wished that fundraising processes had been documented better, but 47.1% were unsure of when they'd find the time to document their work. A full 72% of fundraisers felt that documenting their processes would help them perform their jobs better, while only 52.2% felt satisfied with the amount of time allotted for proposal production (Gunning, 2013a). Subsequent interviews (n = 12) revealed that while the fundraisers were the primary grant *writers*, they frequently worked with project managers and community partners to develop components of the grant narrative.

In 2014, I took this study one step further to analyze where nonprofit organizations stood in the *Information Process Maturity Model*, a structure developed by Jo Ann Hackos in 1997 to investigate the level of documentation an organization establishes. Hackos proposes that the more an organization establishes and disseminates its best practices, the more resources an organization has to provide to expanding its services and relationships with its customer base (J. Hackos, 2004; J. T. Hackos, 1997). The ability to reach more constituents with fewer grant dollars would be of high interest to nonprofit leaders and funders.

There are five stages to the IPMM:

1. Ad hoc: Individuals work alone within the organization, using their own processes.

2. Rudimentary: Employees begin to establish routines, but tend to abandon processes under deadlines;
3. Organized and repeatable: Employees attempt to identify best practices, such as using style sheets.
4. Managed and sustainable: Employees are highly involved in project planning and quality assurance.
5. Optimizing: Users continually assess best practices and seek improvement.

Hackos proposed that the more advanced an organization is within the IPMM, the more the organization can focus on its customer/user needs (1997). The 2014 study found that most nonprofit organizations remain in the Ad Hoc or Rudimentary stages, the two earliest stages in the model, and that it takes writers up to one year to feel comfortable performing their job duties (Gunning, 2014). Ad Hoc and Rudimentary stages mean that processes may change for each new project. While many writers indicate they document their *own* processes, documentation does not often extend to the entire organization. For example, 27.8% of writers noted that their organization “never” or “rarely” has a standard review process for reviewing proposals (Gunning, 2014).

The concept of information process maturity is important because U.S. nonprofit organizations have been increasingly called upon to leverage their grant dollars and maximize their institutional resources (Healey et al., 2010; Horstman, 2006), and one way to be more effective is to develop a strong institutional memory (Gilbert, 2002, 2005; Inc., 2015). Coupled with a high rate of employee turnover, nonprofit organizations are in danger of losing not just their funding sources; their communities may also lose essential “safety net” social services nonprofits provide (Horstman, 2006).

An employee’s ability to tell the story of the organization, using corporate memory—via interviews, annual reports, and stories from colleagues—involves a steep learning curve. If employee turnover is a problem in the nonprofit sector, and if most proposal writers operate as a lone writer, how is the institutional memory of the organization’s success and failures shared among its employees? What were some ways that nonprofit organizations can share these snapshots and stories across departments? These questions remained on my mind after presenting the results of the 2014 IPMM paper at a conference, but several ideas came to mind in between conference sessions. The following section will briefly recount my inspiration for combining these two studies, and will describe the similarities I noted between the two sectors.¹

¹ The study recognizes that the industry similarities are not necessarily limited to the small- to medium-sized nonprofit organizations within the United States and restaurants; these similarities may extend across a number of industries. However, the main purpose of this article is to provide suggestions to the nonprofit industry based on best practices that cross both the restaurant and nonprofit sectors’ employment trends, corporate practices, and common interests, but the suggestions provided within the paper may be applied to other industries with similar interests and or issues.

1.4. Identifying Similarities Between the U.S. Nonprofit Sector and Restaurant Industry

Between conference sessions, I picked up a sandwich at a *Which Wich* sandwich shop. I grabbed a menu-bag from the rack, used a marker to circle toppings, sandwich size, bread choice, and temperature, and handed my order request to the cashier. I watched as the relay team tackled my order, assembly-line style, using pre-proportioned allotments of ham, Swiss, and grape jelly for my Monte Cristo. The employees' efficiency, with my sandwich being one of half a dozen being prepared in this line, was a show of excellence. You could see that the workers had the processes so engrained in the back of their minds that they didn't have to look up to see what went into a Monte Cristo or a *Banh Mi*, and let their natural reflexes grab the appropriate ingredient. Would this process have gone so smoothly had there not been pre-proportioned materials at the ready? Would my experience at the Colorado Springs franchise be echoed at the Houston location? This restaurant, like many, had its procedures down to a science. It is essential for restaurants to do this: their goods are perishable and waste is a higher expenditure than many other fields that do not deal with expiration dates. So I wondered, with my primary area of interest in documentation, could restaurants' KM methodologies help the nonprofit industry?

Demand in the food industry does not wait for new hires: restaurant employees must be quickly trained to represent the organization's ethos and learn how to handle situations. Turnover was especially important for the restaurant's managers, who must coordinate morning and evening shifts with novice and veteran workers, ensuring that the staff could manage the influx of unpredictable guests, surges and wanes in demand, and communicate important information such as availability of menu items to avoid customer grief.

A restaurant and a small- to medium-sized nonprofit organization (defined as \leq \$20M in annual budget) (Gunning, 2013a) have many similarities, in terms of organizational structure. First, both nonprofit organizations and restaurants experience distress due to high levels of turnover. Second, both nonprofit organizations and restaurants work with time-sensitive content: restaurants must order and sell perishable products in a timely manner; nonprofits work with time-sensitive grant application deadlines and project funding dispersion. Finally, both restaurants and nonprofits operate in a high-paced, stressful situation, with shift work for the restaurant employees, and proposal deadlines for the nonprofit employees. The following section will discuss these and other similarities in more detail, and provide context for how nonprofits have similar approaches.

1. Variety of response methods. Both restaurants and nonprofit organizations have a variety of methods to meet the needs of their customers/constituents. Restaurants interact with their customers through menu items, customer service, and entertainment; nonprofits respond to their constituents through program services, websites, education programs, and outreach activities.

2. Employee turnover. Turnover is a problem for both industries: restaurants experience high turnover with wait staff, their main sales force; nonprofit organizations experience turnover with their grant writers and fundraiser, their primary financial drivers.
3. Lack of inter-department awareness. In every organization, it is important to assess each department communicates its project results, goals, and plans to other departments, (kitchen vs front end, or budget vs programming). Is each department operating in a way that makes sense, is easy to understand by others, and doesn't take a lot of time to learn?
4. Cultural and differences in departmental discourse. Many organizations need to adapt to work across cultural differences, or at least across multiple departments representing differing discourses, such as Informational Technology terminologies versus Finance's. Both restaurants and nonprofits need a way to standardize processes in a way that everyone is able to know what other departments are doing and how to respond to various situations using appropriate discourse.
5. Rewarding innovation while avoiding reinvention. All organizations benefit from a strong institutional memory; efficient procedures help employees quickly respond to clients or grant funding deadlines. It is important for the organization to save time and money, avoid unnecessary reinvention, and share strategies with other employees and branches so each employee involved can spend their time doing what they do best. For example, restaurant managers work with perishable products. Efficient methods for calculating orders and forecasting sales is essential to maximize profit and minimize loss; studying a successful business model in the restaurant industry can extend ideas to other industries that may work with time-sensitive deliverables, such as expiring grants.

I plan to bring these five ideas together into an example to show that restaurant shifts are similar to "typical corporations/organizations," moving in fast-forward. For example, corporations often wait until the end of the month to tally sales reports from its salespeople; but at a restaurant, the restaurant head waiters and managers must develop these reports at the end of each shift for the night deposit. Another "fast-forward" example might include how a restaurant solves a customer service complaint: the restaurant usually must respond immediately to the situation as soon as a wait staff or manager is notified; the manager attempts to resolve a problem before the customer exits the establishment, whereas in the corporate sector, it may take several emails or phone calls to resolve a problem over the course of several days or weeks. Having a "fast forwarded" snapshot of how these situations are handled, and subsequently documented and shared with other managers in the establishment, may provide insight to fields that similarly experience problems with turnover.

Similarly, the nonprofit industry often needs to respond to a request for proposals within a six-week time period, gathering letters of support from partner organizations, statistics and outcomes of current programs, and an outline of the proposed grant's budget plan. A six-week deadline can impose a tremendous amount of stress on a nonprofit organization's fundraising department, particularly if the department has recently lost or gained an employee (Gunning, 2013a; Horstman, 2006).

While comparing the industries in the literature review, more questions arose: How do organizations that operate in shifts, across multiple projects and boundaries, and with cross-disciplinary teams share their experiences among employees? How does an organization prevent re-inventing solutions so employees can spend time with their customers, or provide new products and services? If an employee is off-duty on a day when an important event happens, how is information integrated into the organizational narrative? To narrow the research scope for this paper, I asked, what can we learn about knowledge management from industries that go through similar turnover and learning curves?

This study will investigate how a medium-sized, privately held restaurant addresses knowledge management of tacit and implicit knowledge on a regular basis. The study will focus on the micro stories held and shared among managers and staff within an industry that faces high turnover and differences in departmental narratives. The following section will begin to contextualize the procedures and population in detail, and describe how the study was organized.

2. METHOD: A RESTAURANT CASE STUDY AS A SITE OF WORKPLACE COMPOSITION

The following section will discuss the study's participants, including the restaurant's employment demographics; and describe the data collection procedures for the case study.

2.1. Participants

The following section will discuss the operationalization of small- and medium-sized nonprofit organizations and restaurants.

2.1.1. Defining Small to Medium Sized U.S. Nonprofit Organizations

The size of an organization's budget is another way to classify the size of the organization. Within the 2012 study, the researcher used *CharityNavigator.org's* budget classification system for grouping because it had a wider range of budget categories under \$50 million dollars (2013) than the Healey et.al study used, and the focus of this study was on small and medium sized nonprofits. Over forty percent (43.5%) of survey respondents worked at large organizations with annual operating budgets exceeding \$20,000,000 per year (see Figure 1).

Overall, the proportions of organizations in both the dissertation and Association for Fundraising Professionals (AFP) studies (Healey et al., 2010) were similar. For example, 20.1% of dissertation respondents and 20.0% of AFP respondents came from organizations with annual operating budgets under \$1,000,000. The budget breakdown of the AFP survey was slightly different from the survey's budget, grouping \$10M to \$50M budgets together, representing 20.2% of respondents compared to 25.3% of dissertation respondents. Almost thirteen percent of AFP respondents (12.7%) reported budgets over \$50M compared to 26.4% of dissertation respondents. Overall, 32.9% of AFP's

respondents' annual organizational budgets exceeded \$10M dollars, compared to 51.7% of dissertation respondents. For the purpose of this study, organizations with budgets of < \$20M per year were considered small- to medium-sized organizations.

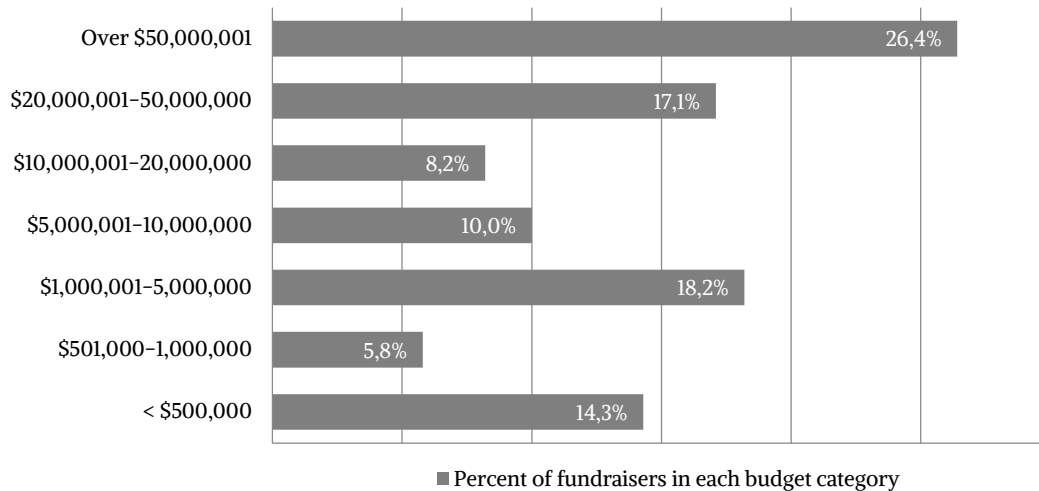


Figure 1: Fundraisers' reported annual operating budget of current organization.

2.1.2. Defining the Small to Medium Sized Restaurant

The restaurant is part of a privately-owned company, with 80 locations in 7 states. The company's restaurants have themes depending on location, including seafood, barbeque, and burgers, at a variety of price points. The restaurants are typically located in suburban and urban areas that are experiencing high growth rates and have middle- to upper-middle income clientele. The site of the study was a mid-priced seafood restaurant (\$20-\$30 per meal average).

Employees are divided into "front of the house" positions, meaning the employees regularly interact with customers ("Guests"), such as hosts, bartenders, and wait staff; "back of the house" employees, who have little interaction with customers, such as cooks, bussers, and dishwashers. This particular location has 76 tables, each table seating between 2 and 10 guests, accommodating up to 408 guests at one time.

The restaurant is open seven days a week and operates a morning and evening shift on each day, with the exception of being closed for Monday lunch shift, when the manager meeting takes place. Each week, the restaurant operates thirteen shifts, and each shift requires a minimum number of front- and back-of the house staffing, calculated by using sales data from previous shifts.

The site employs one General Manager, three Kitchen Managers (who manage back of the house employees), six Front End Managers (who manage front of the house employees), ten cooks, ten

bussers, four dishwashers, forty wait staff, ten bartenders, ten hosts, and one general accountant. On a typical weekend evening shift, the restaurant will have one General Manager, one Kitchen Manager, two Floor Managers, three bartenders, thirty wait staff, four hosts, six cooks, four bussers, two dishwashers, for a total of 53 persons on the shift. These fifty three persons will manage the orders and output for the guests. On an evening weekend shift, the site hosts an average of 1,224 guests, averaging \$30,600 in sales per shift.² Each weekend shift (Friday, Saturday, Sunday nights), represents up to \$91,800 in sales brought in by 86 wait staff (20 wait staff on Sundays, 33 each for Friday and Saturday nights), or an average of \$1,067 in sales per shift per person. If I extend the proportion of waiters to account for a 25% turnover rate, each waiter brings approximately in \$857 per shift.

2.2. Procedures

The study primarily incorporates the method of case study, or organizational discourse analysis, where the researcher focuses on a single site to analyze and interpret written and spoken professional interactions (L. Frey, Botan, & Kreps, 2000; L. R. Frey, 1992; Verd, 2004). The researcher collected observational notes, semi structured interviews, and other documentation, such as shift notes and summaries, individual accounts, and oral stories of events over a period of two years. Schedules, shift reports, and procedures, both published and self-documented, helped identify trends in the organizational narrative. The researcher assessed the content for themes and examples of how situations were addressed in the workplace.

The following section will describe how the restaurant informs its staff as narratives take place, using 15-5 reports, oral storytelling, and routine summaries as methods of building trust, strengthening institutional memory, and building a strong organizational core.

3. RESULTS & DISCUSSION: RESTAURANT KM AND THE NONPROFIT SECTOR

During the two-year data collection period, I discussed organizational practices with more than 50 members of the restaurant staff and management teams and identified nine major themes. The following section introduces nine best practices in place at the restaurant, which include:

- Consistent training procedures,
- Internal promotions,
- Clearly defined standard operating procedures,
- Usable documentation,
- Daily mundane routines,
- Cross-cultural methods of communication,

² These numbers do not include bar sales.

- Quick dissemination of problems and solutions,
- Visual knowledge bases and responses,
- “15-5” management reports, and
- Weekly management meetings based off the 15-5 reports.

The following section will introduce these processes in more detail, and explain how each concept might be transferred for use in a nonprofit setting.

3.1. Nine Micro-Transaction Practices to Strengthen the Restaurant’s Institutional Memory

3.1.1. Consistent Training Procedures.

Within the restaurant, each new hire follows a specific plan for each of their first three weeks on the job, outlined in a published corporate handbook, consistent across all branches of the restaurant. An employee’s first day is spent shadowing the host stand, seating guests, learning greetings and etiquette, and balancing tables among wait staff. The trainee’s second day is spent working in the “To-Go” area, preparing garnishes for take-away meals, and so on. Each employee goes through the same training, using checklists provided by the corporate office, to ensure consistency in handling guests and their orders across all branches of the organization. Likewise, for each position promotion (such as from a Host to a Waiter, or from a Bartender to a Front End Manager), the trainee works with an experienced person (“shadowing”) each shift over several weeks before performing the position’s duties on their own. This helps the trainee adapt to what can be expected in the morning versus evenings, or understand how a Monday night shift differs from a Friday night. Shadowing employees helps the new employee become socialized to the different roles employees play within the organization, and illustrates boundaries of job titles and duties. If an employee fails to report for a shift, other shift members know what duties are expected of the position, and are able to step in to complete them as needed.

The nonprofit and corporate sector’s training programs tend to be much less rigorous; shadowing would be helpful. The 2012 study on nonprofit fundraisers indicated that employees are expected to acclimate on their own after a day or two of orientation and through trial and error, asking others within their departments for help if needed. If nonprofits included a shadowing program for program associates or program managers, they may find that it reduces the one-year learning curve that many employees report when joining a new organization (Gunning, 2013a).

3.1.2. Internal Promotions Help Build Institutional Memory

When a restaurant employee is promoted to a management position, they are required to be able to perform all of the job roles of employees under their direction, whether it is slicing vegetables, cooking in the kitchen on a busy Saturday night, washing dishes, or ordering enough Red Snapper

to make sure the restaurant can sell it in a timely manner. This way, managers are well aware of the time constraints and pressures put under *Sous Chefs*, Salad Makers, or Bartenders, and have a better idea about each position's constraints. Learning the other job roles has a second benefit: managers can easily step in to assist any time that is necessary—a manager is not above taking drink orders, shucking oysters, or checking on a food ticket while if a worker needs assistance.

Internal promotions may lead to less risk in turnover, more trust among employees. Daily interaction with other departments helps employees understand the roles each other play within the organization, and eases the transitions if one person is to leave the organization. Nonprofit organizations might develop a similar training program that promotes internal promotion. Project Assistants might become Grant Writers after working on several projects with the lead grant writer. Additionally, incorporating more than one person on an organizational narrative helps disseminate the stories beyond a single writer, making the institutional memory widespread and subject to less risk if an employee leaves for a new position.

3.1.3. Standard Operating Procedures are Clearly Defined

The restaurant has developed a standard process for every procedure, large and small. Dinner plates get five ounces of rice, each entree has a specific garnish, lemons are cut into eighths; four shrimp go into a cup of gumbo; seven shrimp go into a bowl. Maintaining consistency helps balance budget issues and avoids waste, as well as track quantities over time to see how much is needed over seasons. Documenting these procedures and noting trends is particularly helpful for seasonal promotions, such as the live crawfish season between December and March. If new managers join the roster in between seasons, they can easily review previous years' orders and notes about estimates to order the subsequent season's product. These help prevent over/under-ordering, saving money and preventing waste. These standards are developed through trial and error until the best practices are identified and recorded, tested and continually revised along the way.

Nonprofit organizations might use time tracking to estimate the amount of time that should be spent on various projects or planning sessions. Nonprofit organizations do not often document the time or resources needed to complete various duties (Gunning, 2014). For example, a \$100,000 grant may take approximately 82 hours to write: thirty-two hours of research, twenty-three hours of writing, ten hours of meetings, and seventeen hours of editing. Having estimates documented can help organizations budget time and consulting hours more efficiently, and will likely help organizations manage their time and funds better during the proposal preparation process. This documentation can also be used to argue for funding, providing quantitative data. Management might use this data to determine whether a consultant or hiring a full-time employee is more cost-efficient for their long term goals.

3.1.4. Documented Procedures are Easily Accessed

When a new person is no longer “in training” at the restaurant, they can still rely on documented content at any time, using a shift reference book. For example, an employee may rarely make an “Old Fashioned” drink if customers have not ordered that drink in a long time. A quick recipe guide can provide the ingredients when necessary. Employees can also make tweaks to new drink recipes if customers complain about the taste, portion size, or price, or make note if a customer enjoys a new product. These shift reference books are a combination of a recipe book and portable knowledge base entry, and are easily accessible by all bartenders and managers. Front-end managers copy notes from the day’s work into their shift report.

Reference binders can be faster than electronic storage methods to answer questions when humans cannot. Providing a knowledge base, whether electronic or in paper, is essential for covering common answers, such as what ingredients go into a drink, or the proper procedure for following up with a guest who notes a food allergy. However, sometimes an Index is more useful than a Keyword search, particularly if the researcher isn’t sure what they are seeking. Providing quick references for common questions help new employees gather background information about the organization over time, using small increments and learning experiences to gather intuitive responses to a variety of high-paced situations.

3.1.5. Mundane Work is Integrated into Each Day’s Schedule

On Sunday mornings, the waiters empty the salt shakers so they can be washed *en masse* through the dishwasher. Tuesdays, front-of-the-house employees wash windows before their shift starts. Wednesdays, bartenders flush the beer lines. Every day has a specific “mundane” task in addition to daily activities. These mundane tasks provide standards of daily practice; anyone who works a Sunday evening shift knows that they will be filling salt shakers upon arrival—no matter what—and this routine becomes engrained in their minds as a shift worker. No “undesirable” jobs pile up for “spring cleaning,” because a little is completed each day.

Embracing a schedule for mundane tasks helps prevent large problems from building up. The restaurant rarely has to worry about pests, problems with machinery, or other hiccups in the production of their daily purposes due to the coverage of these daily tasks being divided into manageable tasks. Nonprofit organizations could similarly introduce mundane tasks to their daily work, such as writing up a summary sheet of services rendered for a community program on the 30th of each month, or collecting a narrative from a service provider on the 1st of each month, or making five new cold calls to potential partners each Thursday, or writing 15–5 reports each Friday. These routine tasks help reduce the overall workload into small, manageable events, so that there should not be a time when project managers have to run around, collecting data for a report that is due in 24 hours. Building routines into daily work helps maintain calm in a deadline-driven environment, such as the grants sector.

3.1.6. Rapid Dissemination of Problems/Solutions to All Employees

The restaurant has a white board near the front of the line called the “86” board. This white board is used to inform all waiters that a product (e.g. “86 Gulf Coast Oysters”) has run out during the course of the night, and if any substitutions need to be made. The restaurant layout is a large oval, so waiters go in through the back doors to the dishwasher, drop off plates to be washed, go to a pack up station to box up any to-go food, pick up desserts and salads, and finally entrees to go out to their tables. An 86 board greets the waiters as they pull up to the Entrée line, so they know what to tell their guests if they happen to order something that has recently run out. Word of mouth also passes this information along the line, using “86” as a code language to shorten the term in typical diner-speak (86 stands for “8 foot long, 6 feet deep,” how a coffin is buried). This language also prevents negative association of waiters shouting, “We have run out of X” in earshot of waiting customers in the bar, who can see the 86 board from their seats. This board helps soften a negative association while Guests are waiting to being their dining experience. Waiters who arrive in time for the following shift can quickly see which products may be out of stock, infer that it may have been a busy shift, adjust their routine accordingly, and be caught up on the organizational narrative with only a few words on the white board. Likewise, the “86” items always being listed in the same place helps reduce confusion and questions during a busy shift.

Some studies have indicated that having a “proposal control center,” such as having a board room dedicated to the process, is helpful for the co-writers (McIsaac & Aschauer, 1990). Similar to an “86” board or “Today’s Specials” board, a large white board for proposals could illustrate the proposal project status at any time. Co-authors could update their progress on the project at any time, without needing to email the entire team. A board provides a visual representation of the project status helps people form a snapshot of a long-term project in a way that is accessible and easily translated into their minds. For example, see Figure 2 for an example progress board.

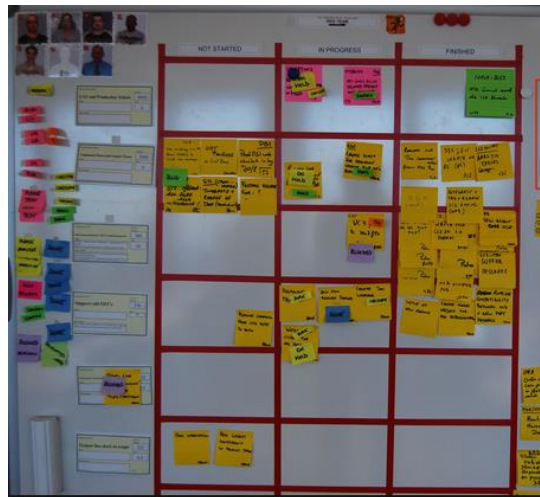


Figure 2: Example of a white board that divides project tasks into Haven't Started, In Progress, and Finished.

3.1.7. Visual Storytelling Across Language Barriers and Cultures

Building on the previous point, *rapid dissemination*, the restaurant has determined methods for ensuring consistency in communication, no matter what language you speak, through use of color and numbers. Items prepared (e.g. vegetables chopped, fish deboned) on Monday are labeled in a container marked with the day's date in red marker. Items prepared on a Tuesday consistently use an orange marker, etc. This way, any employee can tell when a container of food was cut and/or needs to be used, and to use older product first, because *red* always means *Monday/Lunes* and *orange* always means *Tuesday/Martes*. For example, a five gallon drum of margarita mix with a masking tape label that states "6/01" in red means that the mix was made on Monday, June 1. This visual system of color-coded and numerical content ordering helps reduce waste and provides a clear system that everyone knows how to use, no matter the employee's first language. For some employees, the color may provide more meaning; for others, the date may be their method of working. This method provides two ways of translating information quickly to employees.

Nonprofit organizations can use similar color filing systems for showing how far along a project is in the development cycle. New ideas might be coded red, projects that are ongoing might be coded blue, and completed tasks might be coded black. This system would help new employees identify where each project is in the development cycle, without having to read each proposal.

3.1.8. Management Reports at the End of Each Shift

Each year, the restaurant buys a large red 365-day diary to document the shift's happenings. Each page is divided in half to represent morning shift and evening shifts, and the floor manager for each shift documents what happened, similar to the 15-5 reports noted earlier. The floor manager records which employees called in sick, any guest issues that arose and how they were solved, injuries on the job, the total guest count, the shift's sales amount, if the restaurant "went on a wait," the weather, number of reservations, any problems with employees, if any items were "86'ed" (ran out) and any other issues that other managers should need to know. Because there is only one diary, and it is easy to flip through and find what one is looking for, the book serves as an easy way to ensure the creation of institutional memory. The diaries also help acclimate new management to the past and show what can be expected; for example, how many pounds of live crawfish do we typically go through for the *Mardi Gras* promotion? Additionally, since each floor manager is contributing to it, missing entries are obvious and will be called out at the management meeting each Monday. Since each diary entry is only half a page, the amount of information is not overwhelming, the writer must be concise, so the other managers can catch up to what happened on shifts they did not work.

Nonprofit organizations can integrate write-ups into 15-5 reports, as the Patagonia leader uses with his teams. Each week, colleagues can contribute to a single place to give an update of what they accomplished, where they need help, and the general tone of the week. Every other team member can read these reports, and they can be used to investigate trends or repeat problems, or stave off employee problems before they become unmanageable. Putting these reports in a central location, *in*

print, rather than in electronic form, help make the records more accessible and easier to use, and avoids cumbersome key word searches. The physical size of the large, bright, 8x13 book, stored in a central location, can help facilitate transparency across departments and make it used more often than over-sent emails or memos. Organizational leaders can use weekly reports to check in with departments, avoid wasting time, and not miss crucial issues going on that they may not have been aware about, echoing 15/5 reports (Inc, 2015). See figure 3 for images of the diary used.



Figure 3: Shift diary example

3.1.9. Management Meetings each Monday

Mondays tend to be the days that many restaurants close for regrouping, receiving shipments, taking care of maintenance, or simply taking a break after a long, busy weekend. Each week, all Kitchen Managers, Floor Managers, and the General Manager come together with the Accountant to discuss events that took place during the previous week using the big red diary as their starting point. This weekly standing meeting provides a chance for all of the asynchronous managers to get together and discuss the week's 13 previous shifts, some of which they worked, some of which they merely read about. This meeting provides a chance for the managers to assess best practices, hear how others handled various situations, add detail to the written account, and brainstorm how to handle similar issues in the future. This helps build community among the asynchronous workers and ensure that they are on the same page going into the following week, such as any large reservations that might affect the week's order, events in town, upcoming conventions, weather concerns [the restaurant location was along the Gulf of Mexico shore in a hurricane-prone area]. This regrouping session also helps form solidarity among the managers, as they have a chance to

share their stories and strategies, since they typically work alone on a shift and have to handle these situations on their own.

Nonprofits could use 15-5 reports to build camaraderie into weekly department meetings and increase transparency across departments. Nonprofits can use similar written documentation methods as ways to build conversations and understanding across various departments, particularly departments that may not have had a chance to overlap in ideas. This process would help the “left hand of the organization know what the right hand is doing,” a frequent lamentation in knowledge management studies (O’Dell and Grayson, 1998). Having written documentation in place, developed at the time of the conflict or situation, will prevent important details from being forgotten or omitted, and may also provide a more indirect way of explaining problems than could be handled face to face. Doing so may increase perceptions of interpersonal trust, crucial to the development of organizational memory, particularly in traditionally hierarchical organizations (Tsai and Ghoshal, 1998).

3.2. Importance of Visual, Tangible Knowledge Bases to Serve Organizational Memory

It is interesting to consider that most of the restaurant’s knowledge bases are in paper form, rather than electronic form, even though food and bar orders are placed through a touch-screen system, and payments are processed on a point-of-sale computer system. While the restaurant has no less than nine touch-screen monitors placed throughout the restaurant, paper is the fastest, most usable form of information retrieval. Compared to earlier studies on KM use in organizations, most studies report that knowledge management incorporates databases, intranets, and other forms of electronic storage (O’Dell et al., 1998; Schorr, 2004; Tsai & Ghoshal, 1998). The paper form may make it easier for users to find the content, rather than searching within a database.

The bar recipe binders and shift diaries provide limited spaces for daily entries; the writer must prioritize which information to include or omit from an 8-hour shift recap. The employee must be concise and clear so that other readers can understand what occurred. The blank pages in the diaries help encourage managers to write down what happened—one would not want to arrive for a Monday management meeting and not have summarized what occurred during one’s shift. A glaring omission would indicate irresponsibility, and would likely decrease the amount of trust other managers felt towards the shift leader. Accountability is enhanced through working with a partner each shift: each Floor Manager works with a Kitchen Manager, and they can serve as reminders to each other to document the processes along the way.

The tangible, visible nature of a large red shift diary, stored in a metal desk, where a user can flip quickly to the day’s description, or compare one day’s summary (for example, recaps of Mother’s Day lunches in 2014 compared to 2015) can be used to understand how sales, headcount, or problems may occur. A manager does not have to use key words to search an online intranet, or sift through

hundreds of uploaded, unorganized reports; the reader simply pulls the knowledge base off the shelf. This system has worked well for this particularly successful restaurant chain; it may be a practice that nonprofit organizations wish to implement. The organizations would need to determine how their content would break down over various departments: perhaps Fundraising, Programming, Research, Management, and Finance, subsequently managed by each department leader.

Many of these practices are instituted at the daily level, taking minutes to complete, rather than requiring a complete systemic overhaul of the systems currently in place. Organizations may try incorporating some of these practices gradually, until they become habits, or adjust them to meet the needs of the users and institutional memory. Additionally, the incorporation of multiple voices to the creation of a central knowledge repository, allowing competing micro stories and antenarratives to seek their appropriate place in the larger organizational context. Multiple areas of input may help reduce uncertainty of retaining institutional memory should an employee leave the organization.

4. CONCLUSION

This case study presents only one small sample of knowledge management solutions found in a fast-paced, high-turnover industry, but the size of the organization and the efficiency of how it is run may provide useful suggestions to smaller nonprofit organizations with similar budgets or employee numbers. This paper has illustrated that in this particular case study, knowledge management solutions don't have to be expensive, or even "technology based;" central storage and easy access may be more important in a fast-paced environment such as restaurants and nonprofit organizations. Short summaries, such as 15-5 reports, work well to convey documentation, and ensure that the authors choose the most important information to include in their brief reports.

4.1. Limitations

This study was limited to a single organization and therefore findings reported may not reflect best practices in all small- to medium-sized restaurants and organizations. Not all practices identified may translate into strong knowledge management ideas for other organizations; the paper simply introduces the practices at one site of study and encourages the KM leaders to consider ways that procedures done in one organization might translate or be contextualized in another.

4.2. Next Steps

These nine suggestions are some of the ways that small- to mid-sized nonprofit organizations might consider borrowing from a successful restaurant practice to improve their knowledge bases and institutional memory. Many other small- to medium-sized industries may find similar solutions that may work in their organizational contexts; however, the suggestions made in this article do not assume that all organizations have the same needs. The article merely proposes that knowledge

management practices identified in this particular restaurant's success may be translatable across other sectors, if deemed appropriate or feasible.

Each of the nine suggestions is integrated into the daily (or at very least, weekly) processes of the organization, so they each become part of the mundane, daily routines that are essential for building a strong knowledge base. The weekly meetings and brief 15–5 written reports help centralize the content, rather than leaving a trail of memories across the map-less corporate intranet. As indicated by the nine areas, there is *not necessarily a large amount of written documentation* taking place in the organization: two brief paragraphs per day. Consistent labels. Ingrained routines. Micro transactions, building up over time, create stability across an organization, day in and day out, so that if the organization strikes a problem—a hurricane, city riots, or a sudden economic downturn—the organization can quickly refer to what they have done in the past, identify if a process needs improvements, and respond efficiently and appropriately—even if the leader is new to the organization. The leaders save time and energy by not having to duplicate their research and problem solving: their solutions are right on the shelf, and their shared stories have been building up over time, with few surprises along the way.

4.3. Future Research

Future research might investigate whether the suggestions provided within this argument have helped or hindered a nonprofit's institutional memory, and what suggestions the organization has to improve their own knowledge bases.

While many knowledge management studies have implied that electronic systems are the best ways to store and share knowledge across organizations, this particular case study has shown that physical documentation may be more beneficial when working in a fast-paced environment. Physical documentation might save time when locating the content when under deadline. Last, organizations might consider using multiple ways to visually illustrate content and processes, such as color-coding content to indicate where projects are in the development process. In today's information-flooded culture, these visual shortcuts may help reduce users' cognitive load when responding to fast-paced situations. Employees should consider methods that allow departments to "triangulate" institutional memory, providing multiple viewpoints on how various situations were handled in varying contexts, incorporating competing antenarratives (Boje et al., 2015).

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