OFFBOARDING KNOWLEDGE TRANSFER PLAN

Purpose of this resource: *This document is intended to help departments in retaining critical organizational knowledge as employees exit the university in order to maintain operations, employee morale, consumer confidence, and the quality of service provided.*

How to use this resource: *Follow the three steps below to develop a Knowledge Transfer Plan collaboratively with the exiting employee as soon as possible after you have been informed of their intent to exit the university.*

1. Collect Initial Knowledge Documentation
2. Knowledge Transfer Interview
3. Knowledge Transfer Plan

1 Collect Initial Knowledge Documentation

***Timeline**: Immediately after receiving notification of employee's intent to exit the university*

As soon as possible, begin collecting knowledge documentation from the exiting employee. Use this documentation to determine what needs to be further discussed in Knowledge Transfer Interview (Step 2). Consider asking the employee to provide:

1. Project status report(s) which might include:
   a. List of all current, outstanding, and important upcoming projects, deadlines, and tasks
   b. List of ongoing regular tasks
   c. List of open items on which the employee is currently working
   d. Contact information for those with whom an employee has been working on tasks, projects, committees, etc.
2. A comprehensive contact list which might include:
   a. A list of key people (internal and external) to whom someone else should be introduced before the current employee leaves their position
   b. A list of external agencies or groups (including contact information) with whom the exiting employee interacts in fulfilling responsibilities
3. A compendium of documents which might include:
   a. Compilation of specific files/records/emails related to current or past projects to be retained for a period of time
   b. Ask the employee to save all documents on departmental shared drive
   c. Documentation on processes, procedures, or systems the exiting employee interacts with

2 Knowledge Transfer Interview

***Timeline**: Within one week of receiving notification of employee's intent to exit the university*

It is recommended the supervisor meets one-on-one with the employee and any relevant stakeholders to assess potential skill gaps and needs as the employee exits the university. Note: this is not an exit interview. Use this Knowledge Transfer Interview to collaboratively draft the foundation of the Knowledge Transfer Plan (Part 3) with the exiting employee and any other relevant stakeholders. Below are examples of questions that may be asked during a Knowledge Transfer Interview:

1. Can you break down your daily routine into step-by-step instructions?
2. Are there any projects that you repeat on a weekly, monthly, quarterly, or annual basis? What are they and how do you do them?
3. Who are your regular contacts, inside and outside the organization, so we can inform them of the transition?
4. What tasks take priority in your role?
5. What are three things you have learned that you wish you had known when you started your job?
6. What is the biggest challenge your successor will face? What advice would you give them?
7. Are there any systems that your successor needs training on?
8. What files does your successor need to know about and have access to?
9. What are two initiatives you are most proud of? What makes them effective?

3 Knowledge Transfer Plan

***Timeline**: Immediately following the Knowledge Transfer Interview*

Use the below tables to create a Knowledge Transfer Plan that identifies succession plans and potential skill gaps

Identify Key Tasks/Projects

Identify Key Tasks/Projects	Identify Key Stakeholders Taking Over those Tasks/Projects				Transfer of Responsibilities Date
	Responsible	Accountable	Consult	Inform	

Identify Knowledge/Skill Gaps

Task Project	Employee Assuming Responsibility	Potential Knowledge/Skill Gap	Action Plan to Bridge Skill Gap (i.e. Training Plan)	Action Plan Start Date	Action Plan Completion Date