



THE KNOWLEDGE RETENTION TOOLKIT

The Knowledge Retention toolkit provides PHLs with a model to capture and retain explicit and tacit knowledge (information) within their organization.

The toolkit is designed to capture at-risk and critical knowledge that is specific to organizational performance and decision-making. It is intended to retain valuable information from employees prior to their departure to help new employees and the organization adjust. Information captured and retained also provides PHLs with insight on what is going well, as well as opportunities for improvement.

The Knowledge Retention Toolkit includes the following three components:

- Managing Knowledge
- Exit Interview
- Onboarding Plan

MANAGING KNOWLEDGE

The Managing Knowledge section provides multiple avenues to capture at-risk and critical knowledge that is specific to performance and decision-making. This section is designed to be administered under the following conditions:

- Departing/terminating staff;
- Key personnel, such as managers, supervisors and program directors, whose unpredicted absence could cause a significant impact in operations; and
- Staff who will be on an extended absence, such as under FMLA.

Examples of the general questions presented in the guide include:

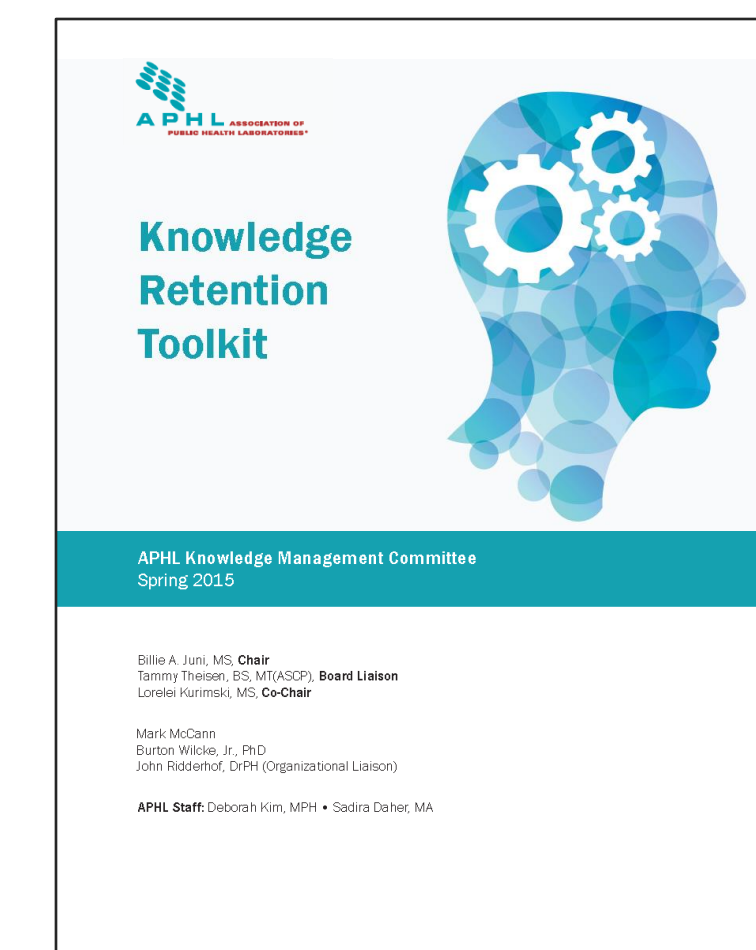
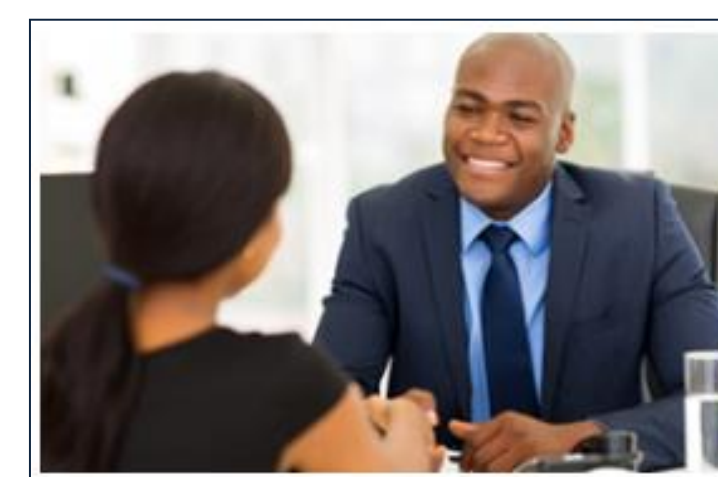
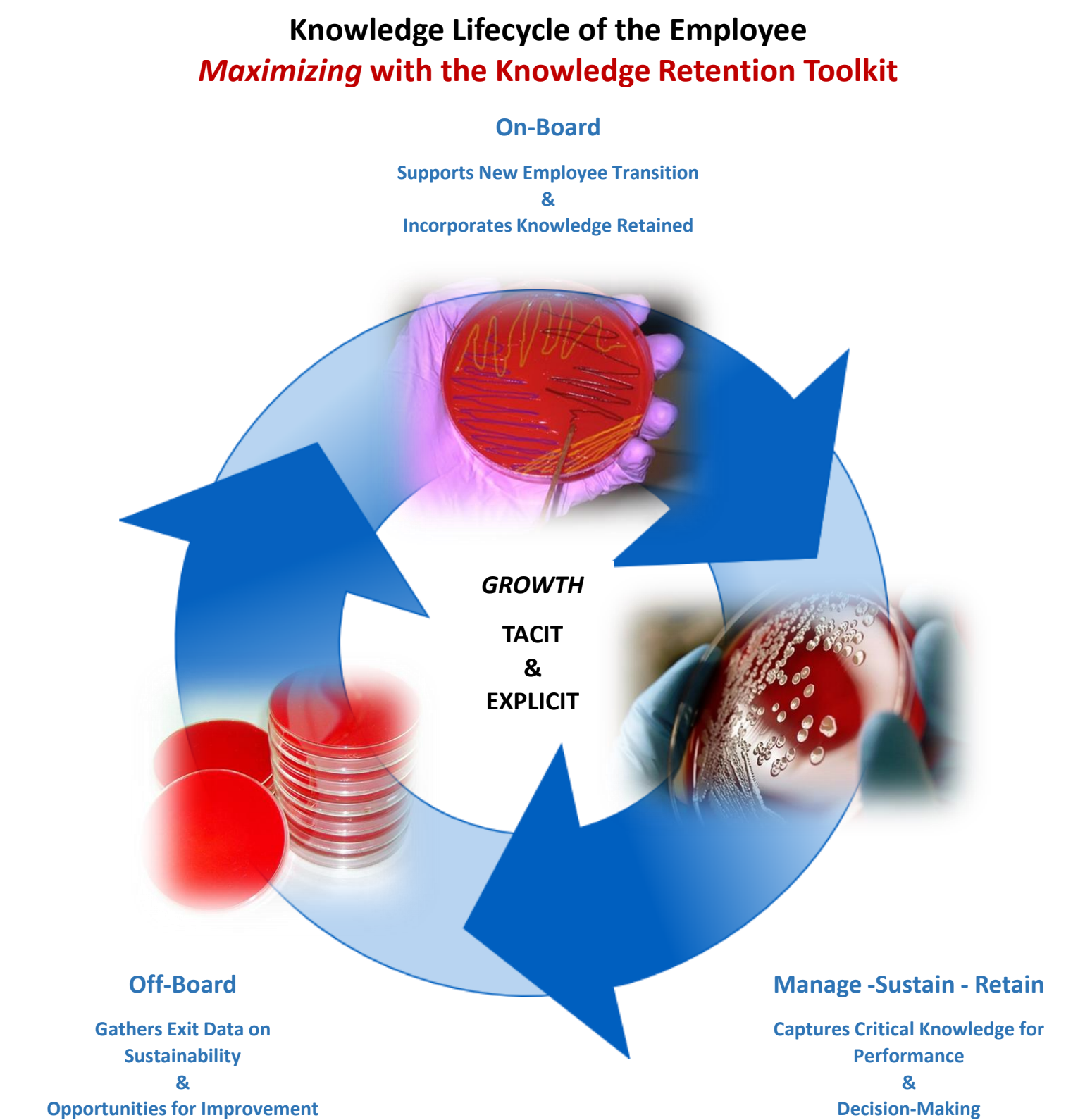
- What procedures do you find most useful for performing your tasks?
- Are there any quality assurance practices you have found particularly useful?

EXIT INTERVIEW

The Exit Interview should be completed by any departing staff. The tool provides an opportunity to collect information about what your organization is doing well and opportunities for improvement.

Exit interview table from the Retention Toolkit

Number	Exit Interview Question	Response
1.	What is the primary reason you are leaving your current position?	
2.	Were there other factors not listed above for why you are leaving your current position?	
3.	What did you like about the position?	
4.	What did you dislike about the position?	
5.	Do you feel the position needs to be replaced?	
6.	What are the critical skillsets needed in this position?	
7.	What qualities or traits are most important for a person to succeed in this position?	
8.	What, if any, were the barriers to succeeding in this position?	
9.	What can our organization do in the future to avoid losing a valuable person such as you?	
10.	What are you most proud of that you have accomplished in this position?	
11.	Do you have any suggestions for onboarding?	
12.	Do you have any recommendations for any responsibilities that should be evaluated or changed with this position?	



ONBOARDING PLAN

The Onboarding Plan should be developed for any new employee. The plan supports the transition of responsibilities through assurance that key tasks are completed and phased in over an extended period of time (up to one year). Much of the information collected from a departing individual in the Managing Knowledge section provides many of the components for building the Onboarding Plan for a particular position.

Selection from the onboarding table in the Retention Toolkit

Category	Task	Notes or Hyperlink to Relevant Information	Primary Point of Contact	Due Date
Administrative Essentials	Basics- Prep office/work area, phone, PC & essential software and access rights, including LIMS and internal networks.			
Administrative Essentials	Basics- Paperwork/certificates			
Administrative Essentials	Basics- HR orientation			
Administrative Essentials	Basics- Update/join memberships at local/state/national associations, join key listservs SEE MANAGING KNOWLEDGE SECTION			
Administrative Essentials	Basics- Schedule attendance at meetings, participation in essential workgroups or committees SEE KNOWLEDGE RETENTION TOOL			
Administrative Essentials	Basics- Complete employee health needs, PPE			
Administrative Essentials	Basics- Orientation on strategic plan			
Administrative Essentials	Documentation- Get full list of affected grants/contracts.			

For More Information

<http://www.aphl.org/aphlprograms/research/knowledge-management>

Acknowledgements

The APHL Knowledge Management Committee (KMC) contributed to the creation of the Knowledge Retention Toolkit.

This publication was supported by Cooperative Agreement #U60HM000803 from the Centers for Disease Control and Prevention (CDC) and the Assistant Secretary for Preparedness and Response. Its contents are solely the responsibility of the authors and do not necessarily represent the official position of the Centers for Disease Control and Prevention.

© Copyright 2015, Association of Public Health Laboratories. All Rights Reserved.