

# Sample Successor Knowledge Transfer and Development Plan

**Employee Name:**

**Incumbent Employee Name:**

**Effective Date of Plan:**

**4  
Implement,  
Monitor,  
Development  
Plans**

**Instructions:**

1. From the Successor Knowledge Transfer and Development Plan, select and transfer the top 4-5 development areas for the recipients.
2. Include the KT strategies, tools and resources that best captures the transfer of knowledge for each of the development area.
3. Complete a separate Successor Knowledge Transfer and Development Plan for each potential successors.

Development Area	Knowledge Transfer Strategies, Tools and Resources	Successor(s)	Target Completion Date	Transfer Measure
1. Interpreting policy and collective bargaining agreements for compliance.	<p><b>Job Shadow –</b>                      Retiree Employee X has the greatest cumulative knowledge on polices and Collective Bargaining Agreements impacting training. Critical that potential job shadow the retiree.</p> <p><b>Document Repositories</b>                      Employee X will work towards organization of electronic documentation accumulated and make it available to others, prior to leaving the position.</p>	Employees: A, B, C, D	07/31/2021	<p>Shadow to observe discussions when sharing knowledge to others and demonstrating how to apply knowledge appropriately to situations.</p> <p>Completed inventory electronic documentation transfer to current leader.</p>
2. Writing proposals for new program(s) or for purchase of services or renewal of contract, obtaining quotes and providing cost justification.	<p><b>On Job Training –</b>                      Providing instruction by other employees in unit as well as Finance and Procurement to focus on sharing processes, procedures via hands on support to become familiar with the agency's finance, procurement and contracting processes.</p>	Employees – A, B, C, D	08/30/2021	Observes all processes and procedures.