

# Succession Planning To Minimize the Loss Of Institutional Knowledge

The process of preparing for leadership or staff transitions and retaining best practices for present and future reference

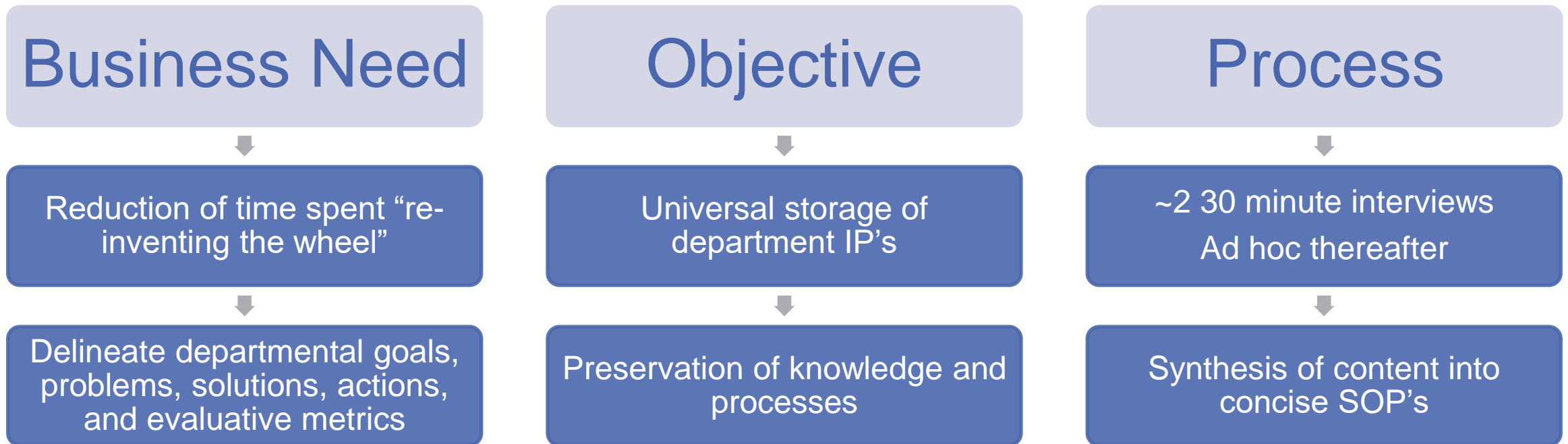
\*This is a pilot that was not initiated

# Retention of Institutional Knowledge

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## Background

At HISD I piloted a project to begin the capture of institutional knowledge because I saw the rampant turnover of seasoned staff and leaders, whether individuals were leaving the school district or moving to different departments. I first wanted to identify the business need, the objective, and process.



# Initial Meeting w/ HR leaders

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- ❑ Establish trust and context:
  - ❑ Explain purpose and benefits of knowledge transfer
  - ❑ Creating organizational resilience and continuity
- ❑ Discuss department specific needs:
  - ❑ Gather unique insights and critical knowledge capture
- ❑ Identify key individuals for knowledge transfer

# Interview Process

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## Question Examples

### Role Specific Knowledge

#### Responsibilities and Functions

- ☐ What are your primary responsibilities and day to day tasks?
- ☐ Are there specific tasks that only you handle? If so, what are they, and why are they unique to your role?

#### Decision Making

- ☐ What types of decisions do you make regularly, and how do you approach them?
- ☐ What key factors or criteria influence your decisions making process

#### Challenges and Solutions

- ☐ What are the biggest challenges in your role, and how do you typically address them?
- ☐ Are there recurring issues face? How have you developed strategies to manage them?

# Interview Process

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## Question Examples

### Process Knowledge

#### Core Processes

- ☐ Can you walk me through a typical HR departmental process?
- ☐ Are there any workflows or processes that you have refined or customized for your role?

#### ☐ Documentation and Resources

- ☐ What documents, templates, or tools do you frequently use? Are there accessible to others?
- ☐ Do you have a specific approach for organizing and storing information

#### ☐ Dependencies and Interdepend

- ☐ What are the biggest challenges in your role, and how do you typically address them?
- ☐ Which processes in your role are critical to other parts of the organization?

# Interview Process

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## Question Examples

### Relational Knowledge

#### Key Contacts and Networks

- ☐ Who are the most important contacts for you in this role? Can you describe your relationship with each?
- ☐ Are there external stakeholders, vendors, or partners you work closely with? How do you maintain those relationships?

#### Interdepartmental Interactions

- ☐ Which departments do you interact with most often, and why?
- ☐ Are there specific individuals you regularly collaborate with to get your work done? What do those collaborations look like?
- ☐ Who do you go to for information when you need help? Who seeks your expertise, and for what topics?

# Interview Process

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## Question Examples

### Experiential Knowledge

#### Institutional Memory

- ☐ Can you share some examples of significant past decisions or projects that shaped your current role?
- ☐ Are there lessons learned from previous projects or initiatives that would benefit a successor?

#### Unwritten Rules and Best Practices

- ☐ Are there any informal norms or “unwritten rules” within your department or the organization that you think a successor should know?
- ☐ What are your best practices for handling sensitive issues or complex problems?

#### Personal Insights

- ☐ What do you wish you had known when you first started in this role?
- ☐ Are there any personal strategies or habits that help you succeed in this role?

# Interview Process

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## Question Examples

### Succession Planning and Future Considerations

#### Potential Changes or Improvements

- ☐ What changes would you suggest for someone new to your role to be more effective?
- ☐ Are there any upcoming changes or challenges you foresee that a successor should prepare for?

#### Transition and Training

- ☐ If you were to train a successor, which areas would you focus on first, and why?
- ☐ Are there any specific skills or experiences you believe are crucial for success in your role?



# Next Steps

Organize and Analyze the Data	Develop Knowledge Retention and Transfer Plans	Create Actionable Succession Plans	Present and Validate Findings	Implement Knowledge Transfer and Succession Framework	Communication and Share Success
Transcribe and review	Create a knowledge repository	Map out succession paths	Create a summary report	Pilot the framework process	Share insights with leaderships
Identify critical details and categorize	Document critical processes	Build development plans for successors	Validate the framework	Standardized knowledge capture	Encourage organizational buy in
	Establish knowledge stewards	Address gaps and risks		Monitor progress and impact	

# Next Steps

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