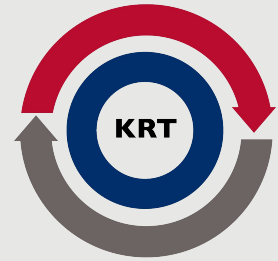




KNOWLEDGE RETENTION AND TRANSFER (KRT) MODEL OVERVIEW PRESENTATION

Bureau for Policy, Planning and Learning (PPL)
Office of Learning, Evaluation and Research (LER)
Knowledge Management and Organizational Learning (KMOL) Function
US Agency for International Development www.usaid.gov
Last Updated: July 2023

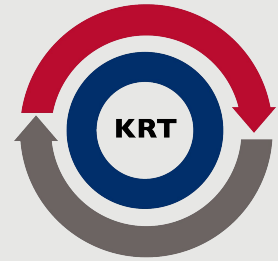
USAID's Agency Knowledge Management and Organizational Learning (KMOL) Function



Vision:

To ensure that **what we know informs what we do**, at the individual, unit and Agency levels, so that USAID continuously improves its contribution to development.

What problem is the KRT model trying to solve?

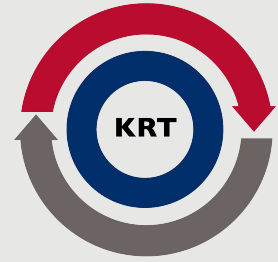


For workforces that experience continuous staff turnover, the lack of systematic knowledge transfer can often lead to:

- Loss of programmatic momentum,
- Duplication of efforts and frustration, and
- Wasted time and resources.

The **Knowledge Retention and Transfer (KRT) model** provides tools, processes, and practices to individuals, teams, offices, and organizations to improve knowledge handover, which in turn improves efficiency and programmatic and operational learning.

KRT model Goals

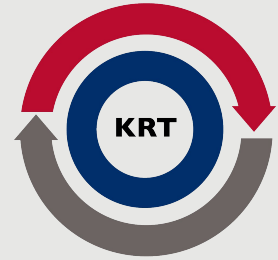


The KRT Model will support the staff transitions by:

1. Allowing the organization to use existing information and knowledge.
2. Enhancing continuity and momentum for programs and operations.

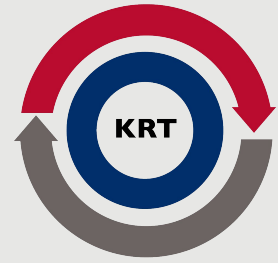
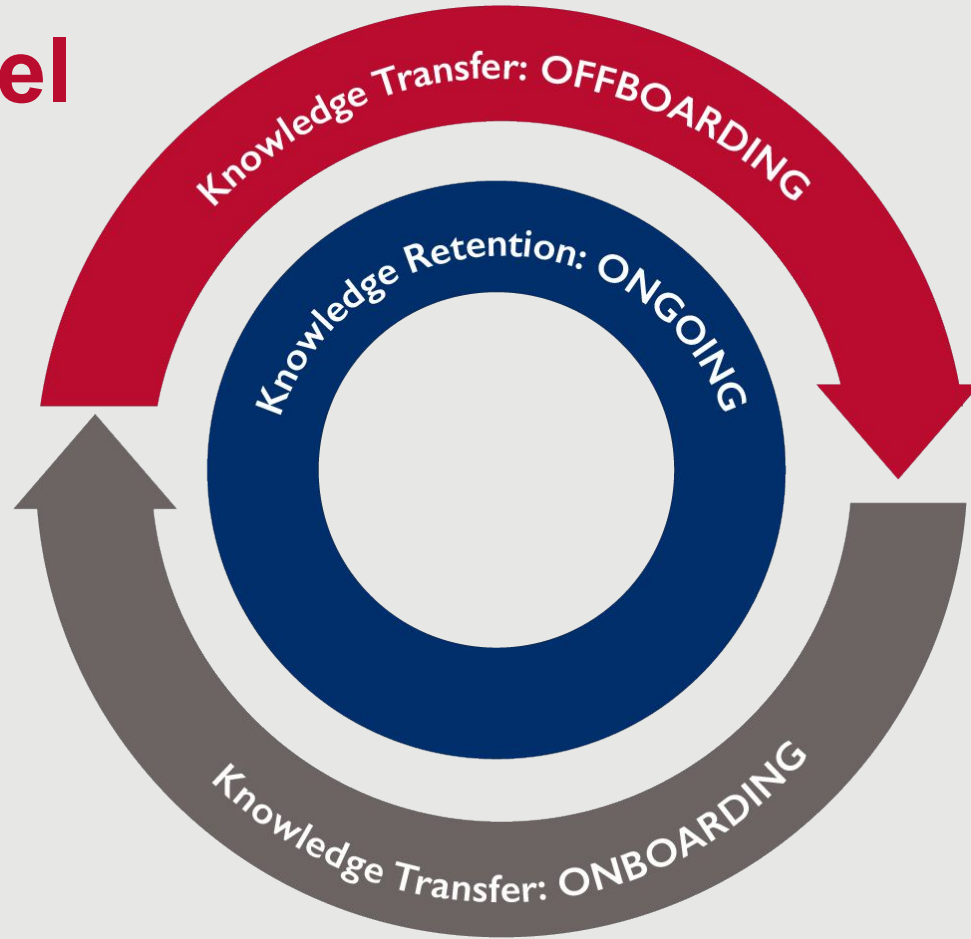


What will the KRT model do for Offices/Teams?

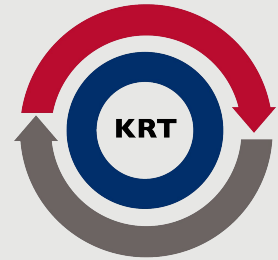


1. **Establish a systematic KRT process** that:
 - a. Supports knowledge continuity and maintains programmatic momentum in programs during staff transitions
 - b. Shares key information about programs and operations, including the history and rationale for adaptations to programs
 - c. Conveys programmatic, operational and cultural contexts, and hands over relationships
 - d. Incorporates experiential insights
2. Help staff **understand** context of inherited portfolios before instituting change.
3. Improve **operational effectiveness and programmatic impact**.

KRT Model

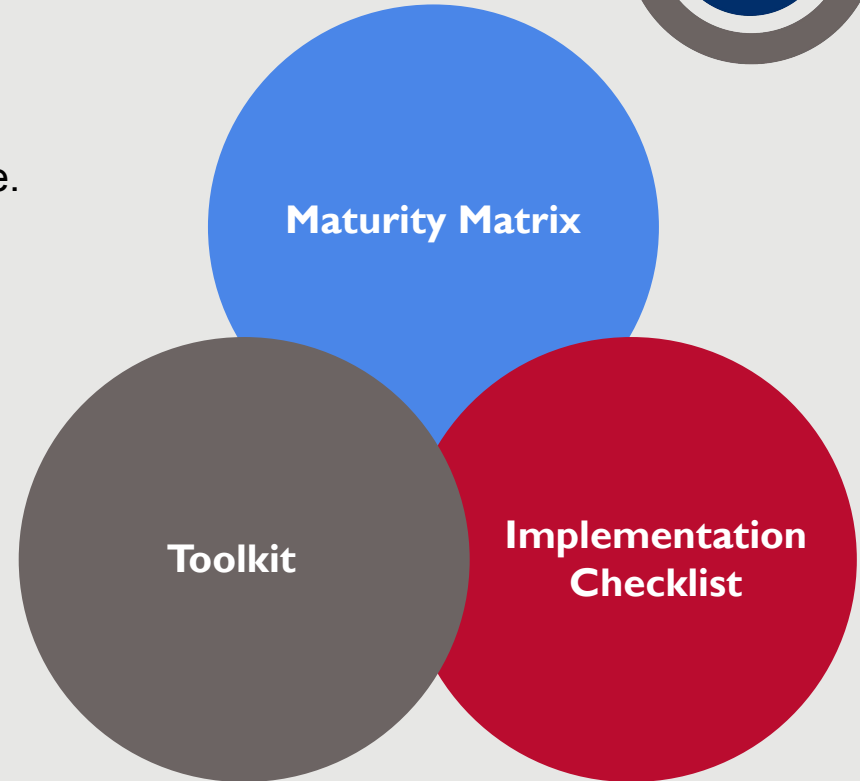


KRT Model: What does it include?

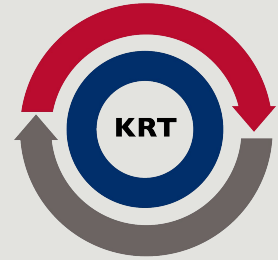


The **KRT Model** includes the following:

1. **Toolkit:** a collection of templates and other resources to help individuals and units capture, organize and transfer information and knowledge.
2. **Implementation Checklist:** a planning tool that describes roles, responsibilities, and actions critical for effective retention and transfer of knowledge. The Checklist is organized by the phases of KRT: onboarding, offboarding, and ongoing knowledge retention.
3. **Maturity Matrix:** a self-assessment tool to help offices/teams understand the current state of KRT, plan and act on improvements, and reinforce best practices to strengthen overall knowledge retention and transfer.



KRT: Reflection Questions



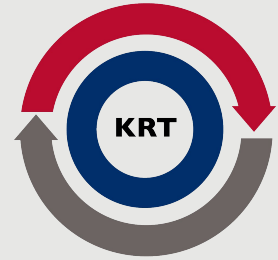
WHAT WE KNOW: Are we capturing, organizing, and sharing information and knowledge with the right actors at the right time to promote continuity and momentum in our programming and operations?

HOW WE APPLY: Are we using the KRT model to facilitate access to and use of the most important information and knowledge relevant for maintaining continuity and momentum?

WHAT WE DO: Are we planning, acting on, and reinforcing our KRT tools, processes, and learning activities to strengthen KRT, advance along a maturity spectrum, and adapt as necessary?

+ Enabling Conditions: Do we have a viable implementation plan and leadership, resources and an organizational culture that support our knowledge retention and transfer efforts?

What comes next?



Suggested next steps include:

1. Start with the **Handover Memo** and **Exit Interview** templates
2. Use and modify the **Implementation Plan** to fit your needs
3. Use the **Maturity Matrix** to assess your KRT efforts

Please email kmol@usaid.gov with any questions.