KNOWLEDGE RETENTION & TRANSFER (KRT) MODEL

IMPLEMENTATION CHECKLIST

The KRT Checklist is a planning tool that describes roles, responsibilities, and actions critical to Knowledge Retention and Transfer.

The KRT Checklist highlights the core tasks and tools for effective knowledge handover. The KRT Checklist is meant to be used alongside the KRT Toolkit. Additional tools and templates can be found on USAID Learning Lab.

Program Office or Human Resources Team

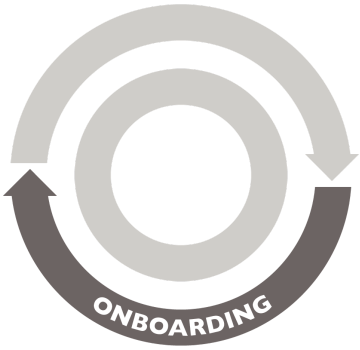
- ❑ Share the most recent/up-to-date version of the Onboarding Experience Survey once staff has been onboarded into the team or office.
- ❑ Consult Onboarding Experience Survey Guide to edit or update the Onboarding Experience Survey (sample version linked).

Human Resources Team

- ❑ Write and send Welcome to Post email prior to arrival of incoming staff.
- ❑ Share the most recent/up-to-date Staff Organizational Chart and all staff directory to incoming staff.

Incoming Staff

- ❑ Receive, read, and review the:
  - ❑ welcome to post email,
  - ❑ staff organizational chart, and
  - ❑ handover memo.
- ❑ Attend a virtual meeting or phone call with the outgoing staff and/or team/office POC during orientation.



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Program Office or Human Resources Team

- ❑ Analyze and share findings from Onboarding Experience Survey with new staff and/or relevant team/office stakeholders.
- ❑ Lead the Maturity Matrix Self Assessment.
- ❑ Update the Handover Memo template yearly prior to offboarding.

Outgoing Staff

- ❑ Schedule and attend a virtual meeting or phone call with the incoming staff or team/office POC in preparation for offboarding.

Incoming Staff

- ❑ Attend a second meeting with the outgoing staff prior to their departure and after receipt of the handover memo.
- ❑ Complete the Onboarding Experience Survey.

Program Office or Human Resources Team

- ❑ Send Handover Memo template to Outgoing Staff.
- ❑ Store all handover memos in a central shared location and restrict access to staff who require access.departing staff. If the departure timeline is known, we suggest starting the offboarding process 3-6 months before departure.

Human Resources Team

- ❑ Update Exit Interview Template if necessary.

Incoming Staff

- ❑ Handover Memo:
  - ❑ Prepare your Handover Memo: If the departure timeline is known, we recommend starting the handover memo process 3-6 months before departure.
  - ❑ Share your Handover Memo: send your handover memo and schedule a meeting or call with the incoming staff prior to your departure from post.

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