**Facilitated Transition Planning Interview Process Guide/Checklist**

| **Step** | **Action** | **Notes** |
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| 1 | Reserve room for interview | * Once notified that a facilitated transition planning interview will be conducted, reserfve a room to conduct the interview.
* Typically a 90 minute time block is needed.
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| 2 | Secure the note taker | * If you will be facilitating the interview reach out to another team member to be the note taker.
* The note taker will take detailed notes and transcribe the conversations that take place during the interview while the facilitator presents the interviewee with the questions.
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| 3 | Schedule the interview with the employee | * Send an e-mail or calendar invite to the employee to be interviewed.
* Attach the Transition Planning Interview Guide found in the Workforce Planning Toolkit so that they can have some background and purpose of the interview as well as review and prepare for the questions that they will be asked during the interview
* Clarify/do not promise confidentiality as the transcript of the interview may be shared.
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| 4 | Conduct the interview | * Kick off the interview by following the prepared script on the Transition Planning Interview Guide Instructions for Interviewer, found in the Workforce Planning Tookit.
* Be prepared to redirect the interview toward its initial purpose, including if the conversation moves toward that of an exit interview.
* Don’t hesitate to ask additional clarifying questions to have the interviewee expand on his/her responses to the questions.
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| 5 | Conclude the interview/review next steps | * Conclude the interview by asking the interviewee if there is any additional information they would like to add that was not asked in the interview questions. Ask, “Are there any other questions we should have asked”
* If the interview is conducted prior to the employee’s last two weeks advise the employee that you will e-mail them the transcript for their final review. This will be their opportunity to make any corrections to the transcript before it is sent to their supervisor. This is done to ensure the interview dialogue was captured correctly.
* If the employee will be departing within the next week advise them the transcript will be sent to their supervisor. This is to comply with the Paperwork Reduction Act of 1995.
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| 6 | Finalize transcript (within 5 days of interview) | * Within 5 business days of the interview, review and finalize the transcript.
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| 7 | Send final transcript to interviewee to review for accuracy (if employee is still on board) | * If the interviewee is still on-board within this timeframe, send them a copy of the interview transcript so that they can review for accuracy.
* Request that any corrections be made via “tracked chages” and request that it be returned within 3 business days.
* Important note - In the event of an off-board, The 1995 Paperwork Reduction Act precludes government agencies from collecting from and providing information to the public.
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| 8 | Send final transcript to interviewee’s supervisor | * If the interviewee has had the opportunity to review the transcript for accuracy and has returned the reviewed transcript, send it to the employee’s supervisor.
* If there was not enough time to have the interviewee review the transcript, send it to the interviewee’s supervisor.
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