



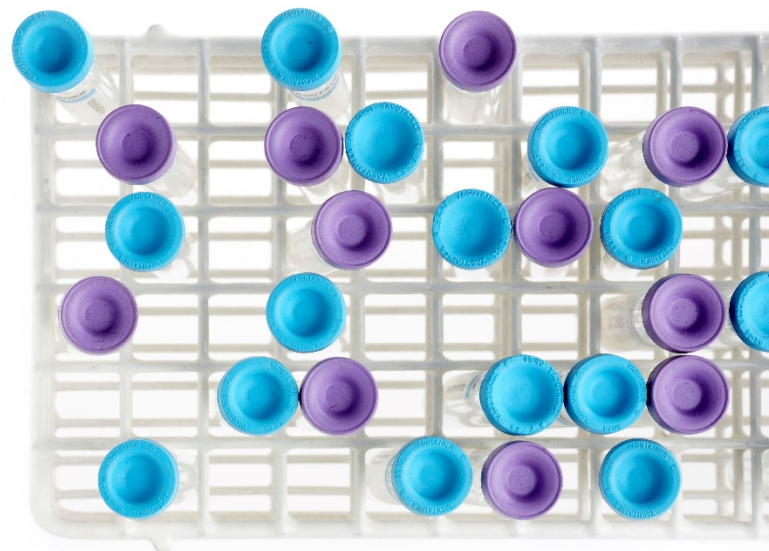
National Institutes of Health
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Resources

Workforce Planning Toolkit

Using the Transition Planning Interview to ensure continuity of the mission

2015



Introduction

Welcome to the NIH *Transition Planning Interview* Guide Overview

Planning for staff transitions and ensuring continuity of knowledge is an important component of workforce planning. Although we can not always predict when people will leave the organization, we can honor and preserve their knowledge, work experiences, accomplishments, and contributions to the mission when they depart thus preparing the next generation.

What is Transition Planning?

Transition planning is a systematic process that ensures the continuity of the IC's mission and scientific direction by developing a plan of action to transition work when a vacancy is anticipated or realized.

The **Transition Planning Interview** allows for honoring and preserving the knowledge, work experiences, and accomplishments of employees and ensuring continuity of the work when an incumbent has decided to depart a position. This information can then be passed on to back-up(s) and/or eventual successor(s)

What is a Transition Planning Interview?

The Transition Planning Interview is a way to allow departing employees to impart positional information, institute knowledge, best practices, lessons learned, and work experiences in a proactive manner to promote a seamless transition.

Why Use a Transition Planning Interview?

- Allows for the capture of critical information not necessarily documented on the incumbent's position description:
 - Knowledge and experiences that made the incumbent successful in the position
 - Trends that may influence the work in the future
 - Suggestions for change or improvements
 - Cultural norms of the office/branch/team
 - Advice for your successor
- Enables organizations to ensure continuity of a position's responsibilities and security of its resources when the incumbent leaves the position
- Can help the organization plan for hiring of a successor who will be successful in the position
- Provides on-demand access to legacy knowledge and job information and provides a platform to cross-train the designated back-up(s) and/or successor(s)

The Benefits of a Transition Planning Interview



How can a Transition Interview help me?

The Transition Planning Interview will ultimately assist with your planning efforts for a seamless transition upon a departure by allowing the departing incumbent to impart positional information, institutional knowledge, best practices, lessons learned, and work experience in a proactive manner.

Benefits of a Transition Planning Interview

- ☒ Promotes seamless staff transitions and prepares others for a successful future transition into the position
- ☒ Allows the departing employee to offer detailed information, tips, tactics about the position, what experiences made them successful, and where there may be room for change
- ☒ Provides a platform to cross-train designated back-up(s) and/or successor(s)
- ☒ Allows the departing employee to offer advise for his/her successor
- ☒ Provides on-demand access to legacy knowledge and job information which can be passed on to a back-up(s) or potential successor(s)

Frequent Uses for Transition Planning Interviews



Who should participate in a Transition Planning Interview?

Although a Transition Interview can be used for any departing employee, the Transition Interview is especially critical for those in leadership and key positions.

Transition Planning Interviews are valuable for:

- ☐ Executive and senior leaders
- ☐ Scientific leaders
- ☐ Administrative leaders
- ☐ Mission-essential incumbents
- ☐ Incumbents in “Stand-Alone” positions or where expertise is concentrated to one or a small number of incumbents
- ☐ Key position incumbents



“The **Transition Planning Interview** *differs* from an **Exit Interview**. The Transition Planning Interview gathers institutional knowledge to set up others for success in a position and organization going forward. Whereas an Exit Interview gauges an employee’s engagement and is used to inform and improve management practices and policies.”

Conduct Your Own Transition Planning Interview



Now it's your turn.

Now that you understand the Transition Planning Interview, it's time to create your own! [Refer to the corresponding templates in the toolkit to get started.](#) You will find the basic structure for conducting Transition Planning Interviews with appropriately labeled sections with guiding questions. You may need to rearrange, add, or omit certain sections based on your specific needs as they might not all be relevant.

Good luck!

