|  |  |
| --- | --- |
| Is the knowledge documented and available? Yes/No | If yes, where is it and when was it last reviewed? If no, what steps are being taken to address? |
| Choose an item. |  |

Part 2 – Developing Actions/Strategies

The key question here is simply, if the person left tomorrow, will all the knowledge leave with them?

Consideration should always be given to ensuring current processes and procedures are recorded electronically and accessible (using the file naming protocols – contact Records Management for further information on the protocol) to allow others to access and review when required. Systems such as Visio can help streamline information, but even a word document provides a starting point.

There will be times when there will be a longer lead-in time for when someone leaves a critical post, for example redundancy, maternity, or notice period. Consideration should be given by the manager (and the exiting employee) to developing a plan within the remaining time available to ensure a transition of knowledge in some form.

There may be team members who have built up knowledge and experience over time – if so then consideration should be given to how their skills can help mitigate any gap, whether that be acting-up, an expansion of duties, or being in a strong position to apply for any vacancy and hit the ground running if successful.

If not, then what steps are being taken to allow team members to increase their knowledge – it could be mentoring, shadowing, internal or external training etc. The PD&R process will also be key in developing existing team members.

|  |  |
| --- | --- |
| Does the knowledge exist within the team? | If yes, who and where? If no, what steps are being taken to address? |
| Choose an item. |  |

Within the broader service area, or Council as a whole, are their other opportunities/strategies to ensure continuity? Are there similar skills and knowledge within another service that may be transferrable? It may that the gap needs to be looked at from a service and directorate level, rather than at an individual team level.

|  |  |
| --- | --- |
| Does the knowledge exist within the Council? | If yes, where? If no and it requires to be, what steps are being taken to address? |
| Choose an item. |  |

Is there a mechanism (formal or informal) to develop a clearer path of progression? Can you in effect ‘grow your own’? Are there opportunities to work with relevant teams and services in other authorities or organisations in the same situation?

|  |  |
| --- | --- |
| Can it be developed internally? | If yes, where? If no and development would be beneficial, what steps are being taken to address? |
| Choose an item. |  |

The critical element of the role may be influenced by external training and accreditation. Who is the recognised authority/provider, and has training been factored into any budget considerations going forward? How best can it be delivered – f2f or online, intense or phased? Can costs be shared with other organisations? What input is required from the employee and what impact might attendance have on service delivery? If options are limited then again review the ‘can it be developed internally’ section.

|  |  |
| --- | --- |
| Is external training and accreditation required and available? | If yes, what? If no and it is a requirement, what steps are being taken to address? |
| Choose an item. |  |

|  |  |
| --- | --- |
| Is job change/role and service re-design required? | If yes, what?  |
| Choose an item. |  |

Based on service delivery, risk and criticality, does the existing job description, team or service structure need fundamentally considered? Is a wider encompassing service review a requirement to enable future service delivery? HR Policy and Operations will play a key part in any job evaluation/re-design, so ensure your HR Advisor is included at the earliest opportunity.