



NASA Knowledge Capture and Transfer: A Guide for the Departee

STANDING ON THE SHOULDERS OF GIANTS...

*Your experiences and knowledge cannot be easily replaced!
This guide was made to help a NASA member who is planning
to retire or transition to a new position take steps towards
passing on their knowledge to ensure their contributions to
space exploration are not forgotten but instead built upon.*

LONG OVERLAP

A long overlap with your successor is ideal! Use the checklist on page 2 to create a plan for **shadowing and mentoring**.

- Bring your successor to meetings and include them on correspondence. Over time, allow them to take on more responsibilities.
- Talk through your thought processes during daily activities. Use the “**see one, do one**” method and provide constructive feedback.

QUICK TRANSITION

Maybe you only get a day or two with your successor. If so, schedule a **sit down to review this checklist**.

- Consider how your successor will **find information about the job** after you leave.
- **Point them to written guidance** or other people in your organization to lean on when they have questions after you leave.

NO OVERLAP

Leaving before a successor starts?

- Consider creating a **continuity book** (digital or printed) that includes all the information from this checklist.
- **Cross train someone else** in your organization using this checklist to fill the gap.



CONTINUITY CHECKLIST

- Duties:** What are all roles, duties, and responsibilities associated with this position?
- Organization:** Do you have an organization chart with names, job titles, and contact information? Who is your supervisor, and what people do you directly supervise?
- Points of Contact:** Who do you interact with? Be specific to include their roles & how to contact them. If possible, introduce the new employee to frequent or important points of contact. After you leave, who else do you recommend contacting for mentorship or advice?
- References:** What documents, books, or regulations are essential to your job? Where can you find them? Are there any sections to highlight that are most often referenced?
- Calendar and Tasks:** What daily, weekly, monthly, and yearly tasks do you accomplish? What important events do you attend? What deadlines do you have? Do you have a checklist or calendar that includes these tasks? Do you have any techniques for accomplishing your tasks?
- Flow of Information:** How and from whom do you receive information (emails, chatrooms, websites, meetings, etc)? Who do you commonly push information to and in what format/setting? Where is information normally stored? Where are important documents stored? What programs or software do you have access to?
- Maps and Locations:** Are there any places that you travel to or buildings/rooms that you often use? How do you get access to those facilities?
- Equipment:** Is there any equipment that you are responsible for or need to use for the job? Do you have manuals, instructions, or videos for how to use it?
- Training and Development:** Are there any courses, conference, or events that are beneficial for this job? Are there any required certifications? Is there a community of practice to join?
- Troubleshooting:** Are there any recurring or expected problems to be aware of? How do you troubleshoot or find solutions?
- Lessons Learned:** Do you have any stories or lessons learned to share? Is there anything you learned “the hard way”? Are lessons learned tracked? Where?

Contact your [Center Chief Knowledge Officer](#) and visit the [KC&T website](#) for more resources!