



Treasury Board of Canada
Secretariat

Secrétariat du Conseil du Trésor
du Canada

Succession Planning for Corporate Knowledge Transfer — A Guide for Managers and Human Resource Specialists



**Succession Planning for Corporate
Knowledge Transfer — A Guide for Managers
and Human Resource Specialists**

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<http://www.tbs-sct.gc.ca>



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Message from the Secretary of the Treasury Board

As a member of the Public Service of Canada, you are part of one of the most effective and important public-sector organizations in the world. Canada's Public Service is internationally recognized for its professionalism, competence and commitment to excellence.

However, a number of factors, such as a shift to a value-based Public Service, financial restraint, and rapidly changing technology are affecting the way the Public Service of Canada carries out its mission. Among these is the fact that the Public Service is aging. Many employees with valuable corporate memory are in a position to retire within the next few years. Their imminent departure poses a challenge in terms of the potential loss of experience and expertise this will entail. Meeting this challenge is a shared responsibility.

This guide was developed to help managers and human resource specialists at all levels facilitate the transfer of knowledge to the next generation of the Public Service.

I invite you to use this resource when applying your valuable knowledge, skills, expertise, and experience to address this challenge. In doing so, you will be helping to build a legacy that will ensure the continued vibrancy and relevance of Canada's Public Service in the new millennium.

Jim Judd
Secretary of the Treasury Board

1. Introduction

Who is responsible for help to build the Public Service of tomorrow? How is this challenge to be met? What can you do to contribute? These are questions that we should all be asking ourselves because, as public service employees, we all have a stake in building the Public Service of tomorrow.

This guide is intended to provide some answers to these important questions. It presents ideas and practical steps, leading practices and policies set in place by the Government of Canada to support the process. Originally based on research conducted for the Committee of Senior Officials (COSO) Subcommittee on Learning and Development, it reflects the various approaches a number of major departments have chosen to address this issue.

The guide is intended to serve as a source of specific examples of knowledge transfer and organizational transition strategies. It is also a vehicle to help human resources specialists and organizations develop their own strategies for managing succession.

An Appendix, “Information and Service Resources” (page 20), provides additional information to help you find answers to specific questions you may have as well as a list of publications, Web sites and other resources of potential interest.

Perhaps most important, this document underscores the necessity of information sharing and of focusing on opportunities to apply successful approaches to knowledge transfer and succession management within and across organizational boundaries.

If you have ideas, examples of innovative approaches or suggestions, you are strongly encouraged to send an e-mail to the e-mail address indicated in the Appendix so that this information can be shared with other managers. In addition, in the near future this guide will be accessible from the *myHR* Web site at <http://myhr.gc.ca> where you will be able to share your ideas electronically.

This guide is a first attempt to help us focus on this key challenge. It will be revised and updated regularly, based on your feedback and on new information sources and examples of innovative approaches as they are identified.

2. Reflections on getting Started

Some of the critical thinking and analysis that is needed to design and implement knowledge transfer activities relates to an assessment of the longer-term needs of the organization. In effect, the human and competency resources that should be retained and/or recruited to sustain a level of capacity to meet the organization's mandate need to be identified.

When a corporate knowledge transfer initiative is being led, it is also essential to ensure that there is a widespread acceptance and understanding of the nature of the issues to be addressed and shared vision on the strategies to be employed. Evaluation and feedback mechanisms are essential as well. It is also true that no department can benefit from knowledge transfer if it does not have a robust system of human resource planning fully integrated with its business planning. In other words, knowledge transfer is an integral part of good business practices and not an isolated activity.

The leading practice examples of knowledge transfer initiatives presented in this guide confirm that there are some essential developmental steps to be taken before designing knowledge transfer initiatives.

The first step is to develop an understanding of the intellectual capital resource and competency requirements that are needed to respond to a department's current and future mandate and objectives. Two of the key questions are as follows:

- How is the core program defined for the department or agency? and
- What is essential program knowledge?

Many departments have found that it makes sense to be quite selective about defining essential program knowledge, particularly where key practices and technologies are changing. It goes without saying that there are certain benefits to be gained from the new ideas and innovative practices that will result from an incoming generation. Another related resource that some departments have focussed on is relationship capital. For example, key individuals in an organization often develop relationships with key stakeholders that may need to be preserved. In addition, departments can assess whether there is a problem that is unique to the manner in which the functions of specific committees are designed or whether there are problems common across all groups and levels. It is wise to focus on priorities in the context of an evolving departmental business strategy when the requirements for knowledge transfer initiatives are being reviewed.

A second step is to define and develop a sense of existing gaps and to identify critical vulnerabilities that may inhibit progress. Demographics and situational analyses that examine age, expected retirements, and departure rates will help to establish useful baseline data. The Research Directorate of the Public Service Commission of Canada is a good source of government-wide data. As well, a number of departments have found that it is useful to supplement this information by initiating a dialogue with employees in order to establish actual

retirement plans and solicit views on current and potential critical knowledge gaps. The result enables an assessment of the organization's vulnerabilities. A final set of questions on how to measure success and what processes can be implemented to provide periodic assessment and adjustment will help departments learn from their efforts. This information could also be shared with other departments.

The third step may involve the development of specific strategies and mechanisms to address identified vulnerabilities. The following sections of this guide offer an overview of some of the best strategies and alternative approaches used to design, implement, and measure the corporate knowledge transfer issue. Techniques that have supported such strategies range from a variety of mentoring and coaching approaches to changes to organizational design that allow knowledge transfer initiatives to evolve organically. A key issue that is relevant at this stage is defining the scope and focus of the corporate knowledge transfer initiatives.

As managers and human resource specialists, you have a vital responsibility to ensure that your organization has the right tools and information to effectively transfer knowledge to the next generation of public service employees. By taking the first three steps, you will help create a legacy of service excellence that will have a positive impact for decades to come.

3. Leading practices

There are many examples within the Public Service of innovative approaches to knowledge transfer. These range from simple sharing of information between colleagues, casual discussions and networking to more formal activities.

Recognizing the need to share corporate memory, many departments are implementing innovative approaches. These departmental efforts reflect some common themes.

In this section, you will note that the first three examples deal with knowledge and skills transfer as well as with retaining expertise; the last three focus on succession planning. What these examples have in common is the fact that each department has been analyzing its situation to identify its knowledge transfer requirements. They have identified who is best able to transfer the information (mentoring) and who is best able to receive the information. Below is a list of departments and examples of what they are doing to meet the challenge of knowledge transfer.

3.1 National Mentoring Program Strategy

Background

Current government priorities and a number of supporting publications have highlighted the importance of a national mentoring program.

The “National Mentoring Program Strategy – An Inclusive Employment Equity Perspective” is a partnership initiative between Health Canada, Canadian Heritage, and the Public Service Commission of Canada. This initiative has been funded through the Intervention Fund of the Treasury Board’s Employment Equity Positive Measures Program (EEPMP).

How it works

The purpose of the mentoring strategy initiative is to develop, create and implement a central and national mentoring repository of best practices and tools on learning and career development, counselling, training, and continuous learning.

The initiative’s Web site facilitates access to government-wide tools and reports on mentoring practices. It aims to improve marketing and communications to keep human resources practitioners, mentoring program co-ordinators, career development, training and counselling specialists, managers, and employees informed of the latest developments concerning mentoring and career progression.

Established on April 1, 2002, this interactive Web site (<http://www.agora-Canada.org/mentor>) was developed as a result of a collective effort of Canadian Heritage and Human Resources Development Canada, Quebec Region. This site is one of the most exhaustive bilingual tools concerning this topic available on the Internet.

Note

More information on this initiative, as with most of the projects funded through the EEPMP or the Embracing Change Support Fund, is available via the Employment Equity Positive Practices search tool at <http://www.tbs-sct.gc.ca/ee> or <http://publiservice.tbs-sct.gc.ca/ee>.

3.2 Alumni and mentoring programs – Statistics Canada

Background

Because many valuable employees will retire from Statistics Canada over the next few years, the agency will lose a significant amount of corporate knowledge. To counter this, Statistics Canada has developed alumni and mentoring programs.

For Statistics Canada's Alumni Program, a framework was developed to engage the services of retirees who have specialized skills and expertise in project optimization, program development, skills transfer and the handling of peak workload periods.

The Mentoring Program targets individuals from either outside or inside the organization. Each mainstream occupational group has a program for new recruits. Each of these programs consists of two to three work assignments in various divisions across the agency.

How it works

For the Alumni Program, an inventory of retirees interested in sharing their expertise and skills has been established. Retirees remain in the inventory for two years.

The intent of the inventory is to preserve corporate knowledge, analytical skills, subject-matter or operational expertise, experience as a board member, or an ability to teach transferable skills for future public service employees.

Managers that require the expertise of retirees for specific assignments can match retirees with the required skill set. Different types of engagements and hiring mechanisms may be used, as stipulated in the Treasury Board guidelines for post-employment.

The Mentoring Program requires each recruit to be matched with a mentor. Senior managers in the organization are encouraged to become mentors. Mentoring courses are offered to senior managers who express an interest in the program.

Assignments are approximately two years in duration and are interspersed with participation on flagship training courses that emphasize hands-on learning. Program duration varies from eight to twelve months, depending on the occupational group.

The Statistics Canada Human Resources Branch manages both programs and provides a central location for obtaining information and advice on the guidelines, the alternatives, and the impact on positions.

Note

In the context of retention and recruitment, such approaches could be used to support the departmental goals of knowledge transfer, best practices, the preservation of corporate memory and to help prepare those who will take over in the years to come.

The costs associated with the recruitment program are charged to a central fund; these include the recruit's salary and training fees.

3.3 *Scientist Emeritus Program*

Background

The Scientist Emeritus Program provides an opportunity for retirees to continue to pursue their work in a non-employment and non-remunerated capacity within a specific science program as recognized scientists.

Agriculture and Agri-Food Canada, Natural Resources Canada, Environment Canada, National Research Council Canada, and Fisheries and Oceans Canada have established such programs.

How it works

The Scientist Emeritus Program is only available to selected retirees from the scientific community who have a long-standing record of superior performance or an established national or international scientific reputation.

The program provides support for continuing research and ensures professional continuity through the transmittal of knowledge and experience.

A memorandum of understanding is signed by the employer and the scientist emeritus. The emeritus status is normally conferred for a one-year period, subject to renewal.

Note

This program may not be easily transferable to non-scientific positions in the Public Service.

There are no salary costs involved. However, there is an organizational commitment to provide administrative services, such as office space, laboratory time, travel expenses, and other amenities required to accomplish the tasks.

3.4 Succession planning and knowledge transfer – Transport Canada

Background

Over the period between 2001 and 2010, Transport Canada is faced with an unprecedented number of potential retirees, particularly in the Technical Inspection, Aircraft Operations, and Executive groups. These employees are highly specialized, and the challenge to replace them is made more difficult by a tight labour market and stiff competition from the private sector.

Transport Canada recognized the need to focus on the elements of succession planning; in other words, recruiting, hiring into developmental programs, developing good general managers, and transferring knowledge. With respect to knowledge transfer, the department was concerned about the threat that large-scale departures posed to its inventory of organizational knowledge. Knowledge, unlike data or information, exists within people, derived from their training and experience, and includes key elements such as judgment, values and insights. Knowledge of this type is not easily replaced.

How it works

In response to this challenge, Transport Canada initiated a knowledge transfer pilot project that has since been expanded. The initiative provides ready access to highly specialized or highly contextual knowledge, has the potential to reduce orientation training time, and encourages codification of knowledge as an ongoing practice.

More specifically, the initiative

- identifies the critical knowledge found in specific occupations and people that must be transferred within the organization;
- ensures a smooth transition of this knowledge from retirees to successors; and
- provides ready access to highly specialized or highly contextual knowledge.

To assist the process, Transport Canada has developed a methodology for identifying critical subject matter experts (SME). SMEs are individuals who hold very strategic jobs or special situational or historical knowledge.

As the first step toward identifying these critical SMEs, Transport Canada raised the following questions:

- Who do others go to in a crisis?
- Who has a long-term corporate memory?

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- Who is doing a “one-of-a-kind” job?
- Who has a unique set of skills or knowledge?
- Who carries the ball on major projects?

Then, employing a prescribed point system, Transport Canada personnel ranked these individuals against five identification criteria for SMEs. The department is in the process of identifying its critical SMEs; once identified, an individualized plan will be implemented to transfer their knowledge to potential successors. Methods could include interviews, job shadowing, and hiring a replacement in advance of departure.

Note

The initiative has benefited immeasurably from senior management support and has made a major contribution to Transport Canada as a learning organization.

Lessons learned include the need to

- accumulate and validate sound data;
- identify and track specific, measurable actions;
- use simple tools that speak to managers’ needs; and
- talk to employees about their retirement plans and involve them in hiring their successors.

The initiative has been well accepted because it offers a common-sense approach that helps the department target resources where organizational risk is highest. As well, it recognizes the unique contributions made by individuals who have served the organization with distinction.

Other organizations facing a similar demographic crunch may benefit substantially from adopting this approach. First, they should get to know their demographic and retention issues in detail. Second, they need to determine their SME vulnerabilities. Failure to come up with an appropriate strategy can leave serious knowledge gaps – gaps that are much more difficult to fill once the incumbent in a critical position is gone.

3.5 Succession management – Human Resources Development Canada

Background

Human Resources Development Canada (HRDC) is committed to using a systematic approach to succession management in order to retain and recruit key staff. Implementation of the first phase began in March 2001 with the approval of a succession management action plan. HRDC’s main

objective is to ensure that a talent pool is available to fill future executive resourcing needs. This includes identifying whether they have individuals who are ready to fill executive positions in the short-term (one to three years) and developing them when necessary, and developing and recruiting a talent pool to fill long-term needs (three to nine years).

The approach is based on the future business needs of the organization. This requires anticipating environmental and organizational changes and the resulting implications for leaders. The HRDC Leadership Profile is a key foundation that articulates expectations for leaders and is linked to the business strategy.

HRDC has adapted some of the private sector's best practices in succession management to the public sector environment. The approach also incorporates existing best practices in other government departments or agencies. Although this process started with executives, this does not mean that it will be exclusive to executives. It will be adapted as experience is gained and as it is moved further into the organization. The goal is to identify pools of leadership talent, not heirs to specific positions.

How it works

The process began with “succession conversations”: focused discussions between the deputy minister's office (DMO) team and each National Management Board (NMB) member. The conversations provided the following information:

- the NMB member's career intentions (including when they expected to retire), possible candidates to replace them, and their development or succession ideas;
- capacity information, such as executives who plan to retire or move for other reasons in the next one to three years, potential replacements and their readiness to take on the role, and which roles are at greatest risk due to retirement (i.e., they do not have a potential pool);
- issues or barriers to raise to the corporate level – these are broader corporate issues that cannot be addressed in the branch or region (e.g., resource requirements for development).

HRDC is capable of conducting vulnerability assessments. Its database provides the following information:

- retirement eligibility projections for the short-, medium- and long-term (2003, 2006 and 2009, respectively);
- actual retirement intentions for the short- and medium-terms;
- information on whether a talent pool is available to fill these positions and the state of readiness of individuals within the pool – this allows the department to determine if a certain position is in a danger, watch, or satisfactory zone.

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At the outset, the NMB agreed to a set of principles to guide the process and actions, which included recognition of the employee's responsibility for his or her own career and the manager's responsibility to develop individuals in line with the organization's needs and the individual's career interests.

Because succession management within the federal context is inextricably linked to other human resource processes and systems, the long-term Succession Management Action Plan Framework consists of six elements:

- hold succession conversations;
- update the HRDC Leadership Competency Profile;
- adjust recruitment and selection to align with succession issues;
- provide focussed learning and development opportunities for potential leaders;
- implement accountability measures; and
- address systemic barriers.

HRDC has updated its Leadership Competency Profile. The HRDC Leadership Profile articulates the expectations or success factors for HRDC leaders in terms of behaviours, values, and competencies. It builds upon HRDC's core competencies for all staff and is aligned with the Public Service's competencies for assistant deputy ministers (ADM) and senior executives.

A first round of succession conversations took place between April and November 2001; all NMB members and employees who report directly to them were involved: 275 individuals, which is close to 100 per cent of the executive population at HRDC.

HRDC is using the data from these conversations to develop a focused learning and development approach for potential leaders and to begin to align its recruitment and selection process to address succession issues.

Notes

Support from senior management is critical and must be visible.

The knowledge transfer strategy must be simple and action-focussed, not simply a paper process.

Transparency and honest feedback are essential – this involves building trust and changing the culture to encourage people to talk about their intentions to retire and to suggest possible talent pools.

The process must be ongoing and systematic to build a "succession culture" that is management-owned and human resource-supported and -facilitated.

3.6 The Functional Community Framework – Agriculture and Agri-Food Canada

Background

In its search to address knowledge transfer issues, Agriculture and Agri-Food Canada (AAFC) has adopted a knowledge transfer approach through a Functional Community Framework. In keeping with AAFC's integrated team-based management and accountability structure of "one department and one common purpose," this comprehensive framework engages senior management in the development of a collaborative human resource strategy.

There are four objectives to this framework:

- to align resources with AAFC's business lines and priorities;
- to manage resources corporately and horizontally as one department;
- to think strategically about the implementation of human resource initiatives across functional communities (FC); and
- to ensure that AAFC becomes a sought after employer in the labour market.

How it works

An FC Head (ADM level) is identified for each FC and is assigned the global responsibility for the renewal, continuous learning and development, re-skilling, and vitality of that community. Communities already identified in AAFC include finance, human resources, information management and information technology, asset management, communications, policy, science and technology, and audit and evaluation. Specific classification and staffing delegations that are given to the FC Heads also ensure consistencies of applications throughout the communities. With the support of the FC Leads (supporting managers), they are assigned to lead specific community initiatives, such as learning and development opportunities, networking, and knowledge transfer.

An FC Liaison Team has been established to co-ordinate the related activities. The FC Liaison Team, along with the support of human resources experts, will provide assistance to the FCs in reaching their goals in a consistent manner across all communities. This team will also ensure that each community shares information and best practices on human resources initiatives.

The delivery approach has three stages. The initial stage involves establishing all FCs, identifying all community members, and conducting demographic or environmental scans. The second stage involves the development of generic work descriptions, competencies, and statements of qualifications. The final phase involves the development of recruitment programs, learning and development initiatives, awards and recognition programs, bridging mechanisms, inclusiveness initiatives, orientation programs, continuous knowledge transfer and long-term

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planning. Once this framework is implemented, gap analysis will continue to be conducted while departmental priorities, work, and FC trends and expertise requirements are considered.

Note

It is expected that through ongoing communication and sharing of information, there will be a significant increase in opportunities for exchanges and learning (formal and informal) that will allow for a natural transfer of knowledge within certain communities and between them. It is anticipated that this approach will diminish workloads, reduce duplication of efforts, and allow for a more efficient use of resources.

4. Policies to support leading practices

A strong policy framework is key to ensuring a successful renewal of the Public Service. Following is an overview of the policies and mechanisms established by the Treasury Board of Canada Secretariat and the Public Service Commission of Canada to support departments and agencies in a broad range of areas related to renewal.

4.1 Special Assignment Pay Plan (SAPP)

Background

Appointments made under the Special Assignment Pay Plan allow departments to appoint employees to unclassified positions for periods not exceeding three years. These appointments can be used for carrying out special projects and for pre-retirement situations in order to allow departments to staff “behind an employee” indeterminately while that employees remains at work for coaching and mentoring.

How it works

Appointments are made under the *Public Service Employment Act*.

Appointments are in effect by a letter of offer to the employee.

Note

This policy does not apply to the Executive Group.

Funds are within approved departmental levels.

4.2 Pre-retirement Transition Leave

Background

Pre-retirement transition Leave is a flexible working arrangement introduced by the Treasury Board in 1999.

Employees who are within two years of retirement may reduce their workweek by up to 40 per cent; however, pension and benefits payments and coverage continue at their pre-arrangement levels.

How it works

Employees must agree to resign at the end of the leave period.

Eligibility criteria include age and years of pensionable service.

The employee's manager must approve the leave request.

Note

Use of this type of leave arrangement may be low because employees who take this type of leave will be working part-time and paid part-time.

4.3 Casual employment (Post-retirement)

Background

Casual employment, as provided for in section 21.2 of the *Public Service Employment Act*, is intended to respond to situations where work is of a temporary nature.

How it works

A person may be appointed for a period not to exceed 90 days.

That person may not work more than 125 days in a given department in a 12-month period.

Individuals hired on a casual contract are not considered employees and, as such, do not contribute to or have access to benefits, including superannuation.

Note

For use with the Executive Group, departments must have a signed Staffing Delegation and Accountability Agreement with the Public Service Commission of Canada.

This hiring practice could be used to a fuller extent in order to provide greater flexibility to engage former public service employees for mentoring, transferring knowledge and preserving corporate memory.

4.4 Part-time worker vs. part-time employee

Background

Individuals hired to work less than a third of the normal working hours (i.e., 12.5 hours per week) are identified as part-time workers and are not considered employees. As such, they do not contribute to or have access to most benefits, including superannuation. These hours can be combined; however, the total number of hours cannot exceed, on average, a third of the normal working hours over a three-month. For example, an individual could work full-time for one week and not work for the next two weeks. Part-time worker arrangements can vary considerably since each situation can be structured to meet the worker's and the organization's requirements.

This may create attractive employment conditions and benefits for retirees.

How it works

Since this is not considered a staffing action under *the Public Service Employment Act*, departments are authorized to make these types of appointments under their own authority, provided that the retiree meets the criteria for a part-time worker.

Note

This hiring practice could be used to a fuller extent in order to provide greater flexibility to engage former public service employees for mentoring, transferring knowledge, and preserving corporate memory.

Part-time employees work more than a third of the normal working hours but less than full-time (i.e. between 12.5 and 37.5 hours per week) and contribute to and have access to all benefit packages.

4.5 Term employment (post-retirement)

Background

Retired public service employees may be hired for term employment through external recruitment processes with the Public Service Commission of Canada.

How it works

Retirees may work for a maximum period of six months less a day on a part-time or full-time basis as a term employee, without having to contribute to the pension plan or having their pension benefits affected.

If the work period is six months or more, the retiree becomes a contributor to the pension plan and pension payments would cease.

Note

For use with the Executive Group, departments must have a signed Staffing Delegation and Accountability Agreement with the Public Service Commission of Canada.

This hiring practice could be used to a fuller extent in order to provide greater flexibility to engage former public service employees for the specific purposes of mentoring, transferring knowledge, and preserving corporate memory.

4.6 Contracting for services

Background

Contracting for services is an effective way for the government to meet short-term work requirements or to acquire special expertise not available internally.

Departments and agencies have the authority to enter into contracts for services, including contracts with former public service employees. The Treasury Board Contracting Policy outlines the requirements related to these contracts.

How it works

Departments must obtain Treasury Board approval before entering into contracts with former public service employees who are receiving a pension when

- the total value of all fees for all contracts exceeds \$5,000 during the lump sum payment period;
- the total value of a non-competitive contract is above \$25,000 (amendments and all applicable taxes included);
- the total value of a competitive contract is above \$100,000 (amendments and all applicable taxes included).

When entering into a non-competitive contract with a former public service employee who is receiving a pension pursuant to the *Public Service Superannuation Act* during the first year of retirement, the policy also requires that departments apply the fee abatement formula found in the *Treasury Board Contracting Policy*.

Executives who negotiate a personal service contract are subject to the *Conflict of Interest and Post-employment Code for the Public Service* and must include, in the contract, appropriate provisions with respect to the Code in accordance with Treasury Board directives. Departments also need to consider restrictions to contracting that may be included in individual retirement agreements.

In all contracts with former public service employees, and especially in cases where the former public service employee is receiving is in receipt of a pension, departments must ensure that these contracts reflect fairness in spending public funds and can withstand the test of strict public scrutiny. Departments must also ensure that they do not create an employer-employee relationship with former public service employees by having them fulfill the same responsibilities they held before retirement.

5. Related research and publications

- 5.1** To assist departments and agencies in taking a strategic approach to human resources issues, the Public Service Commission of Canada has developed a new planning tool entitled *Developing a Staffing Strategy*. This document will help human resources specialists anticipate challenges and opportunities such as corporate knowledge transfers.
- 5.2** A two-year project on Executives in Transition being undertaken under the auspices of the Visiting Fellow at the Canadian Centre for Management Development will result in two publications.
- The first will examine the personal dimension of executives who leave the Public Service and will present a number of case studies along with lessons learned with respect to the transition process. This publication is expected to be released in late 2002
 - The second will focus on organizational challenges around the aging of the public service work-force and will examine a variety of initiatives dealing with succession planning, phased retirement, knowledge transfer and legacy. This publication is expected to be released in the fall of 2003.

Further information on these publications, and other aspects of the project can be obtained by contacting Dr. James Nininger, Visiting Fellow, Canadian Centre for Management Development at jamesn@ccmd-ccg.gc.ca.

6. Conclusion

Meeting the challenge of building the Public Service of tomorrow is made more difficult by the fact that, in most organizations, responsibilities for knowledge management and human resources planning are not always clear. However, the reality is that all of us are called upon to accept this responsibility and to work toward ensuring a successful legacy.

Part of your contribution lies in taking advantage of the information and examples provided in this guide to develop your own strategies for mentoring, knowledge transfer and succession management. The other part of your contribution can be as simple as using your networks to share your experience and your stories with others. As well, your input could form part of a future edition of this guide.

Above all, get involved. Share your ideas. Share your knowledge. Show your leadership by helping build a legacy of which we can all be proud.

Appendix: Information and Service Resources

This guide will be updated regularly with information from you, the reader. In the meantime, if you require further information on the best practices and policies presented in this guide, the following is a list of the organizations that might be of some help to you.

If you want to provide some feedback or suggestions or if you want to contribute a personal legacy story, please send this information via the *myHR* Web site, where this guide is posted.

Agriculture and Agri-Food Canada

Agriculture and Agri-Food Canada (AAFC) addresses the knowledge transfer issue through a Functional Community Framework.

Carmen Beausoleil
Manager, Functional Communities
Functional Communities Liaison Team
Agriculture and Agri-Food Canada
97-930 Carling Avenue
Ottawa ON K1A 0C5
Tel.: (613) 759-1418
Fax: (613) 759-1753
E-mail: beausoleile@agr.gc.ca
Web site: <http://www.agr.ca>

The Canadian Centre for Management Development

The Canadian Centre for Management Development (CCMD) offers many programs and learning opportunities for managers who are looking to develop their capacity as effective leaders to face the challenges of renewing the Public Service.

Canadian Centre for Management Development
373 Sussex Drive
Ottawa, ON K1N 8V4
Tel.: (613) 995-2263
Fax: (613) 943-3261
E-mail: info@ccmd-ccg.gc.ca
Web site: <http://www.ccmd-ccg.gc.ca>

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The Leadership Network

The Leadership Network (TLN) provides information and tools to help managers focus on public service renewal. TLN is the convener of the “Legacy Network,” an informal group of senior public service employees who care about continuity in the Public Service.

The Leadership Network
122 Bank Street, 3rd Floor
Ottawa ON K1A 0R5
Tel.: (613) 996-1353
Fax: (613) 996-2228
E-mail: flong@tln-lrl.gc.ca
Web site: <http://www.tln-lrl.gc.ca>

Association of Professional Executives

The Association of Professional Executives (APEX) has conducted a Transition Planning Survey and has developed conclusions and recommendations that may assist managers in planning transition strategies. APEX also provides managers with information that may assist those retiring from the Public Service.

Association of Professional Executives of the Public Service of Canada
234 Laurier Avenue West, 22nd floor
Ottawa ON K1P 6K6
Tel.: (613) 995-6252
Fax: (613) 943-8919
E-mail: francep@apex.gc.ca
Web site: www.apex.gc.ca

The Public Service Commission of Canada

The Public Service Commission of Canada (PSC) is responsible for all recruitment in the Public Service. PSC legislation, policies, programs and tools to assist departments and their human resources specialists and managers, with resourcing issues are located on the PSC Web site.

The Public Service Commission of Canada
300 Laurier Ave. West
Ottawa ON K1A 0M7
E-mail: info-com@psc-cfp.gc.ca
Web site: <http://www.psc-cfp.gc.ca> or <http://publiservice.gc.ca/hr>

Treasury Board of Canada Secretariat

As the employer of the Public Service, the Treasury Board of Canada Secretariat (TBS) has policies and programs related to a wide variety of human resources management issues. TBS has many services and publications available on its Web site on transition-related issues.

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Web site: www.tbs-sct.gc.ca or http://publisservice.tbs-sct.gc.ca/hr_connexions_rh

Transport Canada

Transport Canada initiated a Knowledge Transfer Pilot Project to identify critical knowledge that must be transferred within the organization. The approach taken by the department may prove useful to other organizations that face similar problems.

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Web site: <http://www.tc.gc.ca>

**Succession Planning for Corporate Knowledge Transfer –
A Guide for Managers and Human Resource Specialists**

Human Resources Development Canada

Human Resources Development Canada (HRDC) is using a systematic approach to succession management to retain and recruit key staff. The approach, based on the future business needs of the organization, may be adapted to other organizations that face similar challenges.

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Web site: <http://www.hrdc-drhc.gc.ca>

Statistics Canada

Statistics Canada is using a comprehensive human resources development strategy to deal with issues such as an aging workforce and technological changes that are changing the way this organization is doing business. It has a number of interesting human resources best practices that might be helpful to other organizations.

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