



## Helping an Employee Transition From the Workplace to Retirement

You may manage, work with or rely on someone who's been at Brown for 20 years or more. They're a trusted colleague, a confidant and, perhaps, a good friend. And now they're retiring. How is that even possible?

While you are genuinely happy for them to enter this new chapter of their life, this major change in your workplace and on your team can bring with it uncertainty, disruption, and an overall sense of loss. All of these reactions are perfectly normal when we face a major life change or transition. The good news is, there are myriad ways to prepare for the shift logically, practically and also emotionally.

As soon as possible, have conversations aimed at planning for the retiring employee's exit that can begin to capture their years of experience at Brown and institutional knowledge. This is a way to both honor their legacy while setting their successor and the rest of the team up for success after their departure. Some suggestions to ease into and work through the transition are outlined below.

### Basic logistics

- Discuss the employee's retirement date.
- Create a transition plan starting backwards from the week of their retirement to ensure all major functions are reviewed, information is passed along, and job duties are reassigned for continuity.
- Consider which team members will take on this person's responsibilities, whether temporarily or permanently.
- Work with the employee to:
  - Transition personal property from your workspace back to your home;
  - Plan to return any University owned property including electronic devices, office keys, ID, etc.
- Make sure the employee updates their home address in Workday.

### Consider the emotional impact

- Acknowledge that your team will move through this major change in different ways; some team members may need time to process and accept their colleague's departure. Be patient.
- Know that this change can be emotional for the retiring employee as well.
- Identify and use the resources and information available through the [Future of Work](#) web page specific to change and transition to help all team members prepare.

### Capture and transfer institutional knowledge

- Meet with the whole team to review major job responsibilities; this may take several meetings.
- Ask the employee to download and share files as needed.
- Work with the employee to document their major job responsibilities, including cyclical projects, timelines, programs or initiatives, along with key responsibilities, duties and tasks. Think in terms of Who, What, When, How & Why.
  - **Who?** Someone who has institutional knowledge knows whom to contact within the organization for information and assistance. Ask the employee to create a list of their University go-to people with the type of information these people/offices provide.



- **What?** Document the major job functions. Encourage them to take a beginner's mindset. Set up the information as if they were seeing/doing the task for the very first time.
- **When?** Consider the ebb and flow of the work; add a calendar of peak times and due dates.
- **How?** Consider how best to share information with your team. Think outlines, tables, and workflows shared in Google folders or via the shared drive for easy access and review.
- **Why?** Consider why things have been done a certain way. If they were creating this process from scratch, what would they change? What will make things easier for the person who will be performing these tasks? Have they ever thought some aspect of their job could be done differently, but no one ever asked? How might that look?

### Celebrate the dedication and achievements of your employee

- Involve your whole team in making plans to celebrate your retiring colleague.
- Plan a celebration that is inclusive and honors the retiree's dedication and commitment to Brown.

If you have any questions about this process, please contact Employee and Labor Relations at [employeeandlaborrelations@brown.edu](mailto:employeeandlaborrelations@brown.edu).