Transitioning From the Workplace to Retirement

While you are genuinely happy to enter this new chapter of your 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 logistically, practically, and emotionally.

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

Basic logistics
- Inform your manager or department manager of your retirement date.
- Work with your department manager or manager 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.

Personal plans
- Update your home address in Workday (if applicable) under Contact Information to ensure proper mailing of any year-end tax forms and your paychecks, if you do not have direct deposit.
- Finalize your transition plan with your manager.

Consider the emotional impact
- Acknowledge that you and your team will move through this major change in different ways; some team members may need time to process and accept your departure.
- You’ve spent years building relationships at Brown; know that colleagues will miss you!
- Take time to recognize and celebrate your own successes in your time at Brown and know that this change can be emotional for you 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.

Transfer your knowledge
- Meet with your manager and other colleagues to review your major job responsibilities and begin to transfer your institutional knowledge to your team; this may take several meetings.
- Download and share files as needed.
- Create a project plan starting backwards from the week of your retirement date to ensure all major functions are reviewed and information is passed along.

- Document and transfer your major job responsibilities, including cyclical projects, timelines, programs or initiatives, along with key responsibilities, duties and tasks.
- What? Document your major job functions. Take a beginner’s mindset. Set up the information as if you were seeing/doing the task for the very first time.
● **When?** Consider the ebb and flow of your work and be sure to add a calendar of peak times and due dates to your documentation.

● **Who?** Someone who has institutional knowledge knows whom to contact within the organization for information and assistance. Create a list of your University go-to people with the type of information these people/offices provide.

● **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 you were creating this process from scratch, what would you change? What will make things easier for the person who will be performing these tasks? Have you ever thought some aspect of your job could be done differently, but no one ever asked? How might that look?

If you have any questions about this process, please contact Employee and Labor Relations at employeeandlaborrelations@brown.edu.

*Taking steps now to prepare for your transition to retirement will help avoid last minute stress and will provide support to your colleagues once you are retired!*