Government Commercial Function

KNOWLEDGE AND SKILLS: GENERATION, TRANSFER AND SHARING

Guidance Note

November 2026

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1. Context

1.1. Overview

1.1.1. This note builds on chapter three of the Consultancy Playbook to provide more detailed guidance for departments on how to incorporate knowledge generation, knowledge and skills transfer, and sharing across the contract lifecycle.

1.1.2. This guidance note sets out:

- What knowledge generation, knowledge and skills transfer, and knowledge sharing is and provides definitions and examples;
- Why knowledge generation, knowledge and skills transfer and sharing is important and the desired outcomes of our strategy;
- When generation, transfer of knowledge and skills, and sharing is expected;
- Who is responsible during the lifecycle of the project;
- How best to clarify requirements when preparing project specifications;
- How best to transfer knowledge and skills;
- Sensitive information and scrub and share guidelines; and
- How to deliver knowledge and skills transfer.

1.2. Contact

1.2.1. If you have any questions or issues, please contact the Markets, Sourcing and Suppliers Team in the Government Commercial Agency via markets-sourcing-suppliers@gca.gov.uk.

2. Definitions and glossary

2.1. Definitions

The following definitions are aligned to ISO 30401:2018 (knowledge management systems).

Knowledge	An asset that people and organisations use to make effective decisions and to choose which action to take. Knowledge can belong to an individual, a team, or an entire organisation. It is gained through learning or experience.
Skills	Ability to perform a task to a set standard due to training or practice.
Knowledge Generation	Actions undertaken with the goal of developing new ideas or objects.
Knowledge Management	How an organisation identifies, stores, uses and shares the expertise of its people.
Knowledge Transfer	The process of sharing what people know so that it can be used by others. This can be done by: ● recording it – turning someone's experience into guides, tools, or documents ● sharing it directly – passing on knowledge from one person to another, for example through coaching or shadowing
Knowledge Sharing	The exchange of information, ideas, and technologies between people and organisations.

3. Systematising knowledge and skills transfer

3.1. Objectives

3.1.1. Government is committed to ensuring it fully uses and reuses the knowledge that it creates, or is created on its behalf, through consultancy and other extended workforce spend, where possible.

3.1.2. Optimising the generation, transfer and sharing of knowledge from consultancy engagements is a central ambition (**see Table 1**). To help achieve this, the default expectation will be that all consultancy assignments (and if relevant, other extended workforce assignments) will generate knowledge, and transfer knowledge and skills across government.

3.1.3. Contracting authorities should develop and maintain systems of knowledge generation, transfer and sharing that are enabled by procurement and governance processes, as well as encouraging a culture of knowledge sharing in their organisation.

3.2. Consultancy procurement and controls processes

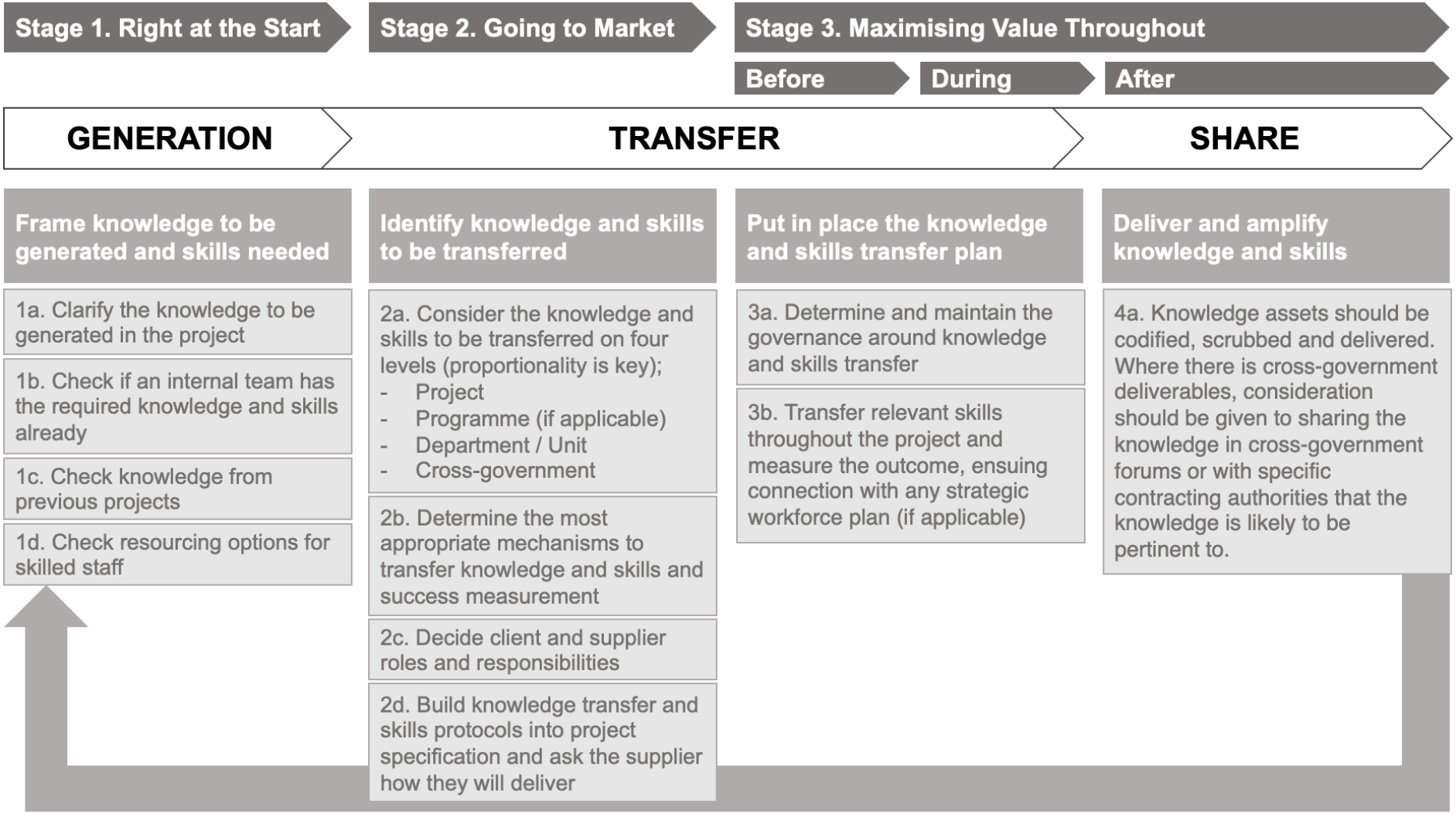
3.2.1. There are a range of routes to market for consultancy services, but generally there is a consolidation around the MCF4 framework which has in-built intellectual property (IP) clauses to support this note. Whatever the procurement route, deliverables on knowledge and skills transfer should always be included. For non MCF4 contracts, additional commercial clauses may need to be included to ensure IP and sharing expectations are clear.

3.2.2. Assessment tests for knowledge generation and sharing should be built into a contracting authority's governance process for consultancy spend. These tests should consider:

- Whether organisations have checked if the knowledge and skills exist in the system before going to market
- The opportunity to extend a requirement to ‘buy it once’ for government where approaches or outputs are widely bought

- Inclusion of codification of approaches to ensure we understand the ‘how’ to answer the question next time around, as well as the final outputs
- Scope for amplification of the work for cross-government benefit. This could be through events, training, development products, handbooks and toolkits

Table 1 - Systematising knowledge and skills transfer



4. Right at the start

4.1. Framing knowledge generation

4.1.1. When a business need for support from the market has been identified, contracting authorities should consider if the knowledge and skills exist within government. The default should be to draw on Civil Service resources and capability, and when we do go to market, we should consider which type of external resource we actually require.

4.1.2. Contracting authorities should carefully consider questions, such as:

- What knowledge is needed?
- Is this knowledge the product of experience in a role (like institutional knowledge), the skilled use of a particular tool or methodology or both?
- Does the team involved already have the necessary knowledge and skills and if not, what is the gap?
- What is available elsewhere across the government?

4.1.3. To answer these questions, contracting authorities should check for the following:

- Existing toolkits and methodologies
- Reports and case studies
- Consulting and advisory teams in-house with the knowledge to either help deliver or frame the specification to ensure that the brief is clear and focused

4.1.4. Organisations should also explore if a similar project has been undertaken in their own department or across Government. Even if previous knowledge does not answer all requirements, organisations should be asking themselves whether work that has previously been undertaken and the related outputs can inform the project brief and rationale.

4.1.5. HR staff should be consulted when making decisions about resourcing options. In the first instance members of the Strategic Workforce Planning team or HR Business Partners can share the strategic workforce plan.

5. Going to market

5.1. Identifying knowledge and skills to be transferred

5.1.1. Once the decision has been made to go to market, knowledge and capability requirements should be refined. The market has extensive experience of transferring knowledge and skills from assignments, so working collaboratively with suppliers from the outset can be very beneficial.

5.1.2. To determine what knowledge and skills should be transferred during the lifecycle of the assignment, it can be helpful to think about four different audiences: project, programme, departmental or unit and cross-government. **Table 2** below sets out some key questions to be considered for each, though this is not designed to be exhaustive, rather a guide to help contracting authorities think through the options.

5.1.3. Organisations and suppliers are encouraged to avoid the pitfalls of thinking that the knowledge generated and skills needed in their project are unique or not applicable elsewhere. In most assignments, there will be lessons learned, for instance, about working with stakeholders, how the project was approached, how to work with technology or tools and the ways of working, that will be broadly applicable.

5.1.4. In addition, contracting authorities should not just think of transfer of knowledge as being a one way process. You should be open to providing easy access to your own thinking and evidence base to ensure consultancy firms can add value, not repeat or guess at it.

Table 2 - Identifying knowledge and skills to be transferred

Audience	Questions
Project - knowledge and skills transferred at the project level to improve the course of the current assignment.	○ Are there opportunities to develop the skills of the client side project team? For example, can the team be supported to take the lead in the development of the work? Such training may be a useful resource for other government project teams to use. ○ Are there specific parts of the engagement that would benefit from formal training sessions? ○ Is the knowledge that will be generated at the project level critical (For example, if it were to be lost would this negatively impact the operation of a service or a function)? ○ Will any handover be required during the project?
Programme (if relevant) - knowledge and skills transferred at the programme level to enhance other projects within the programme.	○ Have lessons been learned especially with regard to standards and processes that could be shared across the programme? ○ Has there been any innovation which could be tested or employed in other projects?
Department or unit - best practices and lessons learned that apply across the department and strengthen internal capability.	○ Are we seeing a repeated need for the same skills? ○ Are there any opportunities for formal training sessions to be shared across the department? ○ Have lessons been learned that would benefit the department or unit?
Cross-government - knowledge that is broadly applicable and building capability across the Civil Service.	○ Is there an opportunity to commission outputs which can be optimised across government? ○ Can we fuse and create knowledge by evaluating tools, lessons learned and findings from other projects across government? ○ Are there any opportunities for formal training sessions to be shared across the department?

5.2. Determining the appropriate mechanism for transfer

5.2.1. Once the organisation has identified the knowledge and skills required to be transferred it is then important to consider the best approach to use. It is worth bearing in mind that working as part of a ‘blended team’ with consultants results in a more collaborative engagement and significantly increases the effectiveness of knowledge and skills transfer. Business units should connect with strategic workforce planning and consider how they will resource the assignment so people are available for skills training. It is important that transfer should not be thought of as something that happens only at the end of the project lifecycle. Transfer of both knowledge and skills should happen throughout the engagement.

5.2.2. Any transfer plan should be proportionate and tailored to the resource capacity within teams and the type of knowledge and skills to be transferred. The plan should consider the nature of that knowledge, how quickly it will go out of date, how easily it can be written down and the intended audience. In smaller, resource limited or highly technical projects, more light touch activities may be appropriate, such as sharing a scrubbed version of the final deliverables of the project. In cases where knowledge transfer is the main goal of the project, it would still be worth considering if there is any need to transfer capability or if there is a methodology or lessons learned to be captured.

5.2.3. There are many ways in which an effective transfer can be managed and a project may benefit from multiple approaches for different constituent parts. **Table 3** below provides a way to think through some non-exhaustive transfer options. For a worked example setting out the deliverables by types of audience and when they should be delivered in the project lifecycle see **Table 4**.

Table 3 - Non-exhaustive transfer options

Approach				
Knowledge			**Skills and Learning**	
Codification (Explicit)	**Codification (Tacit)**	**Community**	**From Others**	**Formal**
For knowledge that lends itself to being put into explicit formats (document, slide deck, spreadsheet, video, podcast)	For knowledge that is usually exchanged person-to-person that is important to be extracted	Where there there is an existing internal community who are the custodians of the body of knowledge in question and can facilitate sharing	For learning that is best received through the guidance of others	For formal learning and for amplifying the number of people receiving the training
- All working documents produced during the project - Case study - Project data - Project documentation - Methodology - Tool - Manual - Handover note - Process map	- Lessons learned - After action review - Thought leadership	- Expert team - Community of practice	- Mentoring - Shadowing - Coaching - On the job learning - Conversations	- Training courses - E-learning - Lunch and learn sessions

Table 4 - Worked example

EXAMPLE: Project focused on the delivery of a complex programme business case	**Approach**				
	Knowledge			**Skills and Learning**	
	Codified (Explicit)	**Codified (Tacit)**	**Community**	**From Others**	**Formal**
Audience					
Project - knowledge and skills transferred at the project level to improve the course of the current assignment.	- Approach to business cases methodology - Handover documentation	- Lessons learned	n/a	- On-the-job development for leads	- Formal training session of business case components
Programme (if relevant) - knowledge and skills transferred at the programme level to enhance other projects within the programme.	n/a	n/a	n/a	n/a	n/a
Department or unit - best practices and lessons learned that apply across the department and strengthen internal capability.	n/a	n/a	n/a	n/a	- Formal training session of business case components
Cross-government - knowledge that is broadly applicable and building capability across the Civil Service.	- Approach to business cases methodology	n/a	n/a	n/a	- Formal training session of the approach to complex, cross-government business cases

	Deliver during the project		Deliver at the end

5.3. Considering measures of success

5.3.1. It is good practice to consider how to measure the effectiveness of the transfer process for each deliverable and to document this as part of the specifications. For the project, programme and department or unit level, it can be useful to develop a questionnaire or interview questions to gauge recipient reaction to learning sessions or to evaluate the transfer process. Where internal team members are being coached during the assignment, tracking the number of issues they are able to resolve, or tasks they can now complete can be useful.

5.4. Deciding roles and responsibilities

5.4.1. To ensure that knowledge and skills transfer happens throughout the project, there should be clear roles and responsibilities for the client and the supplier. The supplier should know what they are being expected to deliver in regard to knowledge and skills transfer and measurement, and at what point during the project that these deliverables should be fulfilled. On the client side, resources and time should be made available to support and champion the transfer process.

5.5. Building knowledge and skills transfer into the specification

5.5.1. The brief should be carefully designed to address the knowledge and skills determined to be transferred. For smaller projects with limited resources it may be that a short paragraph describing the deliverable, the measure of success, the timings for delivery and roles and responsibilities is sufficient. However, larger more complex projects will have multiple deliverables and measures of success and in these cases it is best to include a knowledge transfer plan in the documentation.

6. Maximising value throughout

6.1. Maintaining the governance around transfer

6.1.1. Discussions about the knowledge and skills transfer expectations laid out in the specifications should be covered as part of the good contract management practices established in the project. Touchpoints should be fixed and the key knowledge and skills transfer contacts on the client and supplier side should meet regularly to review progress against the knowledge transfer plan. Knowledge sharing is a dynamic process and adjustments may be needed as the project progresses. Any adjustments should be agreed with both sides.

6.2. Knowledge and skills transfer during the project

6.2.1. Continually sharing information and working documents along the lifecycle of the project and recording key dates and decisions, will ensure that the development of codified knowledge assets or learning sessions are as fresh as possible and limit the risk of the 'thread of thinking' being lost when the project ends.

6.2.2. Codifying knowledge, especially where someone not involved can understand the project takes thought and should not be left to the very end of the project. For knowledge being shared to a cross-government audience there is also a requirement for the deliverables to be scrubbed of sensitive information (see **Table 5**).

6.2.3. For knowledge sharing events and learning sessions that could be useful to a cross-government audience, client transfer contacts should consider what cross-government forums and other mediums could amplify the event with a wider audience. An example of this is The Government Commercial Function (GCF) Community on Knowledge Hub which facilitates knowledge sharing between commercial professionals across government.This could be done in the form of a recorded webinar, a lunch and learn or a live event, whichever is the most appropriate.

6.3. Delivering at the end of the project

6.3.1. All agreed deliverables should be shared with the client point of contact at the end of the project. A final review meeting should take place to confirm that what was expected has been delivered.

6.3.2. Codified knowledge for the project, programme and departmental audiences should be delivered to the appropriate internal repository. For cross-government audiences, the knowledge should be shared with appropriate cross-government forums or with specific contracting authorities that the knowledge is likely to be relevant to.

Table 5 - Scrub and share guidelines

Characteristics of sensitive information:

- Any content classified as secret or top secret
- Personal information about individuals such as medical records, names, addresses and phone numbers, or where disclosure would be considered a data protection breach
- Content protected by patents, copyrights or trademarks, and
- Any information where disclosure would be likely to cause harm or present a risk to HMG

Contracting authorities should work closely with suppliers to ensure that information is only classified as sensitive when there is good reason to do so..

Item	Replacement	Examples
Personal names	Replace all personal names with a title or position. Label multiple people with the same title consecutively.	[Director 1, Director 2]
Personal information	Replace any personal information, such as email addresses, addresses, dates of birth, health conditions.	[Personal Email] [Date of Birth]
Project name	Replace any project names that will reveal confidential information.	[Project Name]
Project description	If confidential, project descriptions should be restricted to a “broad” description of the technical aspects of the project, without sharing any confidential data or the specificities of the project itself.	“Public body, value for money review”
Dates	If confidential, and the combination of the project description and the date would lead to identifying the project, it should be removed.	[Date]
Entity names	If multiple confidential entities are included.	[Public Body 1, Public Body 2]
Photographs	If copyright is not owned, if the photograph will reveal any personal, location, corporate or identity data, it should be removed.	[Photograph removed]

Graphics	Remove any graphics that contain confidential information.	[Graphics removed]
Data	Confidential information must be removed, but a dummy set of data should be entered if it is important to show how the data can be processed or analysed.	[Dummy data being used for illustrative purposes]
Videos	If sharing videos, any person featured should have signed an appropriate waiver and legal advice should be sought.	
Logos and branding	Permission should be sought from the owner. If this is not obtained, all logos and branding should be erased.	[Logos and branding removed]

7. Embedding knowledge transfer: a Civil Service case study

7.1 Summary

7.1.1. The blended partnership delivery is a strategic assurance contract used by the Ministry of Defence (MOD) Directorate of Assurance to deliver defined outcomes across cost assurance, fraud defence and risk management, while systematically building sustainable inhouse capability.

The contract adopts a blended delivery model in which MOD retains ownership of delivery and decision-making, with the supplier providing targeted support, expertise and pace. Knowledge transfer, upskilling and productivity expectations are embedded directly into task design and governance. This approach has reduced long-term reliance on external assistance by building capability and delivering improved outcomes and value for money in comparison to traditional consultancy approaches.

7.2. Context

7.2.1. **Organisation:** Ministry of Defence

Business area: Directorate of Assurance. This case study uses an example from the Cost Assurance & Analysis Service (CAAS) team.

Within the Directorate, CAAS provides pan-Defence assurance across complex, high-value and high-risk portfolios and delivers cost management capability upskilling across the department.

7.3. Rationale for approach

7.3.1. The delivery partnership approach was selected as the preferred model because it combined short-term defence output delivery with longer-term capability building through:

- **Blended delivery:** Defence led with delivery partner on the shoulder support (not workforce substitution).
- **Capability-building:** Enduring cost management capability leaves the organisation measurably stronger at completion of the partnership arrangement.

Alternative options, including traditional workforce substitution consultancy and multiple specialist suppliers, do not offer the same balance of agility, affordability, sustainability or value for money.

7.4. Approach and delivery model

7.4.1. Designing for knowledge transfer

The Directorate Assurance CAAS team worked with defined areas of Defence and the supplier to define partnering conditions, timelines and deliverables. Knowledge transfer was treated as a core outcome, not a by-product with expectations of Defence resource availability integral to the approach. This was achieved through:

- **Task design:** Defence Delivery Leads and supplier Key User Requirement Leads jointly defined outcomes, measures of effectiveness, expected upskilling and productivity gains.
- **Blended teams:** The Directorate of Assurance CAAS team and wider Defence staff (from the receiving area) worked alongside supplier resources using shared tools, data and best practice methodologies. Outputs were jointly developed rather than handed over to create an enduring knowledge base and cost management expertise.

7.4.2. Governance and assurance

Strong governance and contract management underpinned delivery including monthly task performance reviews and financial reporting alongside benefits realisation tracking. These controls ensured value for money and progress against capability gains were assessed during delivery, not retrospectively.

7.5. Outcomes and impact

7.5.1. Improved cost management capability

Internal capability across the receiving area's team is strengthened with increased ability to deliver independently and reducing the reliance on external assistance. This is demonstrated through skills gap analysis quantifying the increased technical capability.

One partnering example saw an increase in cost management practitioner level expertise from 3 FTE to 38 FTE during a two-year cost management improvement partnership. This was supported by the Directorate of Assurance CAAS Team and

the delivery partner at a cost of £1.48m for the external assistance element. This investment will deliver enduring savings of £5.27m per annum in displaced external assistance/workforce substitution.

7.5.2. Managed risk

Risks of dependency, scope creep and capability loss were mitigated through strong task and contract management, embedded stakeholder engagement and continuous governance.

7.6. Key lessons learned

7.6.1. There is a clear return on investment opportunity when knowledge transfer is designed, specified and governed within a strong partnership arrangement.

7.6.2. Delivery resilience is achieved through increased internal capability.

7.6.3. Partnering arrangements add most enduring value when used to develop expertise and resilience at pace rather than as workforce substitution.

7.6.4. Benefits and capability gains must be reviewed throughout delivery, not only at task completion.

7.7. Applicability

7.7.1. This approach is transferable to public bodies where specialist capability is required and long-term affordability, delivery resilience and departmental learning are critical. Partnership agreements can demonstrate how commercial models can support enduring delivery outcomes leaving the host organisation stronger at contract end.



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