**KNOWLEDGE TRANSFER DOCUMENT**

*Place Role Title Here*

Date:

### PURPOSE

#### Ensure business continuity through capturing critical role specific knowledge.

#### Enable seamless transfer of knowledge to others, including incoming employees.

### HOW TO USE THIS DOCUMENT

1. Complete each section to document critical information about the position to prepare others to assume the key functions of the role. Include links/references to additional documents and resources as appropriate.
2. **Outgoing Employee:** Fill out the document with key details about the role.
3. **Supervisor:** Review the document for accuracy and completeness. Use the document to assist with knowledge transfer to existing and/or incoming employees.

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## Section 1: Roles, Responsibilities, and Processes

### BRIEF JOB DESCRIPTION including Key Responsibilities

#### Write an overview of this position, including 3 – 5 key responsibilities. (employee)

#### Link to full job description, after reviewing. (supervisor)

### BRIEF UNIT/DEPARTMENT DESCRIPTION

#### Describe the unit and department and how they relate to the broader university community.

### RECURRING TASKS

#### List cyclical/recurring tasks and functions.

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| Task | Description | Timeframe |
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### PROCESSES

#### Provide step-by-step guides for routine tasks, critical workflows, and tools used.

## Section 2: Ongoing and Upcoming Projects

#### List current or upcoming projects. Include any important dates, status, challenges/obstacles, next steps, etc.

## Section 3: Tools, Resources, and Records

### TOOLS & SYSTEMS

List software and platforms used (e.g., ICON, financial software) and what they are used for.

### PHYSICAL RESOURCES

#### List equipment, files, manuals and where they are kept.

### SHARED RESOURCES

#### List frequently used drives and cloud storage locations.

### CRITICAL DOCUMENTS

#### List locations or links to additional contracts, strategic plans, org charts, etc. not previously included in this document.

### RECORD-KEEPING PRACTICES

#### List standards and guidelines for reporting/record-keeping.

## Section 4: Key Contacts, Stakeholders, and Communication

#### List important contacts: colleagues, supervisors, team leads, vendors, collaborators, committee members, working groups, emergency contacts, etc.

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| --- | --- | --- | --- |
| Name | Title | Connection to this role | Notes |
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### COMMUNICATION PRACTICES

#### Note key communication methods and practices with key campus contacts and stakeholders.

## Section 5: Additional Items for Consideration

### LEARNING RESOURCES

#### List professional development, industry specific organizations/memberships, conferences, events or networks recommended for this role.

#### List any subject matter experts who may serve as useful resources to this position.

### HISTORICAL BACKGROUND

#### Provide details of past decisions or changes that help make sense of the current role.