

Knowledge Transfer Form

A knowledge transfer plan allows to target the knowledge and expertise that should be shared. It also allows you to evaluate how critical a task is to the mission of the organization.

STEP 1: IDENTIFYING CRITICAL TASKS AND ACTIVITIES

(Developing a list of tasks and activities of your work that only you know how to do)

List the tasks and activities below:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

STEP 2: DEFINE EACH TASK AND ACTIVITY

(Identify in more detail the essence of the knowledge and experience required to complete each task or activity)

Critical knowledge and experience worksheet

| |
|---|
| Task or Activity from step #1: |
| List the critical knowledge, experience, or skill needed for this task: |

STEP 3: DEVELOPING A KNOWLEDGE TRANSFER PLAN

(Insert all the critical tasks and activities you identified in Step 1. Answer the questions in the chart for each area. Use the detail you developed in Step 2 to help you think about the questions.)

| Critical Tasks | Importance | Availability | Impact | Resources | Strategy |
|------------------------------|--|---|---|---|---|
| From Step 1 in the worksheet | Low-Medium-High Gauge the importance of the task identified | Is this knowledge and expertise currently available from anyone else in our work area? Yes, No, or Don't Know [if yes, who?] | Low-Medium-High [If the task is important and there is no one else who possesses the knowledge, impact is high.] | What resources [files, people, web sites, references, etc.] exist to help others learn this task? | How do you plan to address this knowledge gap? Who will learn it? How and when? |
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