

## **SECTION 2**

### **HUMAN RESOURCE STRATEGY**

#### **2.04 KNOWLEDGE TRANSFER POLICY**

**AUTHORITY:** P.E.I. PUBLIC SERVICE COMMISSION

**ADMINISTRATION:** GOVERNMENT DEPARTMENTS AND AGENCIES

## **1. PURPOSE**

1.01 The Government of Prince Edward Island recognizes the importance of ensuring continuity of knowledge for processes and work procedures when transition occurs in a position.

## **2. APPLICATION**

2.01 This policy applies to positions that are considered “one-of” positions and other positions that are deemed applicable to this policy by the Director or his/her designate of the respective division.

## **3. DEFINITIONS**

3.01 “Knowledge Transfer” seeks to organize, capture, and distribute knowledge to ensure its availability to other employees. It is written communication of knowledge required to perform a duty, activity, or event for specific positions.

## **4. ROLES AND RESPONSIBILITIES WITHIN THE PROCEDURE**

4.01 Directors or their designate will determine which positions require knowledge transfer documentation.

4.02 Departmental Human Resource Supervisors will:

- communicate the Knowledge Transfer Policy throughout their client department(s);
- keep a departmental list of positions which have been identified by Directors or their designates as requiring knowledge transfer documentation; and
- establish and maintain a list of positions for which there has been knowledge transfer documentation created.

4.03 Supervisors will:

- ensure the completion of the knowledge transfer documentation;
- ensure knowledge transfer documentation is updated as required;
- share knowledge transfer documentation with new employees; and

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- file the knowledge transfer documentation in an accessible and appropriate location.

4.04 Employees currently in positions requiring knowledge transfer documentation will complete the Knowledge Transfer Template and update as required.

## **5.0 ATTACHMENTS**

5.01 Knowledge Transfer Template- "My Blueprint Binder"

# Creating Your Blueprint

## Purpose

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The purpose of knowledge transfer is to ensure there is continuity of knowledge for processes and work procedures when transition occurs in a position. Each identified position will have a *My Blueprint Binder* detailing important information.

The knowledge transfer procedure is as follows:

- The employee currently in the position and their Supervisor should determine which activities, events, duties and procedures require documentation.
- The employee will categorize duties, activities and events as daily, weekly, biweekly or monthly.
- The employee will determine how to best document the duties, activities and events, and the accompanying processes and procedures that are required for each.
- Examples of pertinent information to be shared include:
  - list of duties, activities and events the employee is responsible for;
  - description and purpose of the activities, events and duties;
  - steps required before, during and after the activities and events;
  - processes and procedures that accompany the duties, activities and events;
  - key contact information;
  - expected time frames;
  - notes on how to use specific databases or complete technical tasks;
  - location of important information; and
  - recommended training.
- Updates to *My Blueprint Binder* will be made by the employee and their Supervisor as required.

- The employee will review information with his or her Supervisor to ensure accuracy.
- If the employee is leaving the position, the Supervisor, Supervisor or Director will ensure important contacts are notified, and when possible an overlap training period will exist to transition the work.

## **Job Description** \_\_\_\_\_

This section is reserved for a current description of the position.

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## Daily Duties \_\_\_\_\_

This section identifies the daily duties associated with this position.

<b>Daily Duties</b>	<b>Location of Documentation</b> (If no documentation exists, please complete the below template.)

## Template for Documenting Daily Duties

Below is the template for documenting daily duties, should no documentation exist. All processes or procedures related to daily duties should either be documented in the *My Blueprint Binder* or the location of the documentation be specified. Please ensure all “how to” information is included in the process / procedure segment, and explained clearly and concisely (e.g. spell out all acronyms).

<b>Duties</b>	<b>Detailed Description of the Duties</b>	<b>Process / Procedure</b>	<b>Contacts and Their Role</b>	<b>Potential Issues that May Arise</b>





## Template for Documenting Weekly and Biweekly Duties

Below is the template for documenting weekly and biweekly duties, activities and events, should no documentation exist. All processes or procedures should either be documented in the *My Blueprint Binder* or the location of the documentation be specified.

Please ensure all “how to” information is included in the process / procedure segment, and explained clearly and concisely (e.g. spell out all acronyms).

<b>Duties, Activities or Events</b>	<b>Detailed Description of the Duties, Activities or Events</b>	<b>Process / Procedure</b>	<b>Contacts and Their Role</b>	<b>Potential Issues that May Arise</b>

# Monthly Duties \_\_\_\_\_

This section identifies monthly duties, activities and events that are the responsibility of the position.

<b>Monthly Duties, Activities and Events</b>	<b>Location of Documentation</b> (If no documentation exists, please complete the below template.)

## Template for Documenting Monthly Duties

<b>Duties, Activities or Events &amp; Timeframes</b>	<b>Detailed Description of the Duties, Activities or Events</b> Include: objectives and goals	<b>Process / Procedure</b> Include: post and pre requirements	<b>Contacts and Their Role</b>	<b>Potential Issues that May Arise</b>
Descriptive Name:    Date:  Bring Forward Date:  Planning Date:				
Descriptive Name:    Date:  Bring Forward Date:  Planning Date:				









