

SECTION 2.0

HUMAN RESOURCE STRATEGY

2.04 KNOWLEDGE TRANSFER POLICY

AUTHORITY: P.E.I. PUBLIC SERVICE COMMISSION

ADMINISTRATION: GOVERNMENT DEPARTMENTS AND AGENCIES

Section 2.04 Knowledge Transfer Policy	Date 1 November 2016	Page 1 of 2
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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 Managers 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

Section 2.04 Knowledge Transfer Policy	Date 1 November 2016	Page 2 of 2
--------------------------------------------------	--------------------------------	-----------------------

- 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”

My Blueprint Binder

Creating a Blueprint of Your Position

Position Title:

Position Number:

Employee Name:

Date:

Creating Your Blueprint

Purpose

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 accompanies 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, Manager 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 job description of the position.

Daily Duties _____

This section identifies the daily duties associated with this position.

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

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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).

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

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Weekly and Biweekly Duties _____

This section identifies the weekly and biweekly duties, activities and events that are the responsibility of this position.

Weekly and Biweekly Duties, Activities and Events	Weekly or biweekly	Location of Documentation (If no documentation exists, please complete the below template.)

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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).

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

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

Monthly Duties _____

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

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

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

Template for Documenting Monthly Duties

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

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

Year at a Glance _____

This section outlines the employee's annual calendar to identify the activities and events that are pertinent to the position.

Activities and Events	Date	Location of Documentation <small>(If no documentation exists, please complete the appropriate above template.)</small>

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Information Storage ---

This section identifies the location of information that is relevant to the position (e.g. electronic files, USB flash drive, binders, websites, etc.). Note: this section is only for the location of information that has not been already addressed in previous sections.

Type of Information	Location

Type of Information	Location

Additional Notes ---

Additional Notes _____

EMPLOYEE CERTIFICATION:

DATE: _____ NAME: _____ SIGNATURE: _____

SUPERVISOR CERTIFICATION:

DATE: _____ NAME: _____ SIGNATURE: _____

HUMAN RESOURCE MANAGER CERTIFICATION:

DATE: _____ NAME: _____ SIGNATURE: _____

DEPUTY HEAD/EXECUTIVE DIRECTOR CERTIFICATION:

DATE: _____ NAME: _____ SIGNATURE: _____