

## KNOWLEDGE TRANSFER QUESTIONNAIRE

Purpose: When teammates depart from State of Nebraska, they often carry institutional knowledge that helped them be successful. This tool helps the State of Nebraska retain this knowledge for business continuity.

How-to: Help us capture information about your job that might not be written down elsewhere. Please follow the prompts below. Attach additional pages or materials if needed.

TEAMMATE NAME:	AGENCY & DIVISION:
JOB TITLE:	SUPERVISOR:
<b>1: MANY TIMES, WE DEVELOP "TRICKS OF THE TRADE" TO MAKE US MORE ACCURATE AND EFFICIENT. WHAT ARE THE TOP 5 (OR MORE) LESSONS OR "TRICKS OF THE TRADE" THAT YOU'VE LEARNED IN YOUR PRESENT POSITION?</b>	
<b>2: WHICH PROCEDURES (EXAMPLES: NAMES OF MANUALS, REFERENCES, ETC.) DO YOU TURN TO THE MOST TO DO YOUR JOB?</b>	



3: IF YOU HAD JUST ONE DAY TO TRAIN OR BRIEF YOUR REPLACEMENT, WHAT 5 (OR MORE) THINGS WOULD BE MOST IMPORTANT TO SHARE?

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4: WHERE DO YOU KEEP OR STORE THE FOLLOWING ITEMS?

Electronic files, records, and/or data for team use:

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Electronic files, records, and/or data for your use:

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Hardcopies, paper files, and other physical records:

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Anything else?

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**9: DO YOU HAVE ANY ONGOING PROJECTS THAT SOMEONE ELSE SHOULD TAKE ON?**

Project/Activity	Project Teammates	Is Anything Due Soon?	Project Due Date	Who else could take this on?

**10: PROVIDE THE FOLLOWING ACCESS INFORMATION. WHERE NECESSARY, USE DISCRETION AND PROVIDE TO AUTHORIZED PERSONNEL ONLY.**

Desk phone PIN for voicemail:

State cellphone PIN(s) and passwords for voicemail and/or to unlock phone:

Combination to safe, locker, etc.:

Access information for other devices (list device with access information):

**11: WHERE PERMISSIBLE, PROVIDE LOGIN INFORMATION FOR ONLINE ACCOUNTS FOR OUTSIDE VENDORS AND SYSTEMS NOT MANAGED BY OCIO (EXAMPLES: ENVIRONMENTAL MONITORING SYSTEM; FEDERAL REPORTING/TRACKING SYSTEM; ONLINE COMMUNITY FOR COLLABORATION).**

Vendor/Website/System	Username	Password	Who knows how to use it?

**12: IF YOU ARE RESPONSIBLE FOR CONFIDENTIAL MATERIALS OR INFORMATION, ARRANGE FOR THE PROPER TRANSFER OR DISPOSITION OF THESE MATERIALS BEFORE YOUR DEPARTURE. WHERE ALLOWABLE, PROVIDE INSTRUCTIONS, LOCATIONS, OR RELATED INFORMATION BELOW.**

13: IF YOU HAVE AN ONLINE VENDOR ACCOUNT WITH OFFICE DEPOT, FISHER SCIENTIFIC, GRAINGER, MSC, FASTENAL, CARDINAL PHARMACEUTICAL, VWR, ETC., WHO WILL CONTINUE PLACING AND/OR APPROVING ORDERS AFTER YOU LEAVE.

14. ARE THERE ANY FUNCTIONS, WITH UPCOMING OR RECURRING DEADLINES, THAT WE NEED TO BE AWARE OF? (EXAMPLES: GRANT RENEWALS, PROGRESS REPORTS, SERVICE CONTRACT RENEWALS, PROFESSIONAL MEMBERSHIPS, ANNUAL REGISTRATION RENEWALS, ETC.)

What will become due?	Due date

15: IS THERE OTHER INFORMATION ABOUT YOUR WORK/POSITION THAT IS IMPORTANT TO CAPTURE FOR THE PURPOSE OF ONBOARDING A SUCCESSOR OR MAINTAINING ORGANIZATIONAL KNOWLEDGE?

Thank you for sharing your knowledge and expertise! Your contributions here will help us continue to Grow Nebraska!