



Knowledge Transfer Tool

This tool has been designed to help organisations, communities or nations develop an internal process to plan for the future transition of board directors or group members. An important part of a successful transition is retaining the knowledge that is accumulated throughout an individual's period of service in a group. This can include knowledge about responsibilities, processes, and day-to-day operations of their position. It also includes key cultural knowledge considerations held collectively within the group.

The exercises in this tool are intended for self-directed assessment, completing them will assist you to retain valuable information supporting the long-term stability of your group.

The 5 steps of transition:

The goal of this activity is to break down the transition process into clear steps. Consider each of these five steps of the transition process that apply to your role as a board director, or any other relevant role in your group. You can use butchers paper, sticky notes or a whiteboard to note down specific information that applies to your position.



Key definitions:

Before we begin, here is a list of definitions that can assist you while you complete the exercises in this Knowledge Transfer Tool:

***Explicit knowledge** refers to the skills, knowledge and abilities that can be articulated, documented and taught. An example of explicit knowledge is passing down details about the status of current projects.

***Tacit knowledge** refers to the skills, knowledge and abilities gained through experience in a particular role rather than being taught. For example, knowing when a community member prefers to be contacted by telephone rather than by email.

***Cultural knowledge** refers to the collective beliefs, values, rules and customs that inform a group's way of life. Deep cultural features shared across all Aboriginal and Torres Strait Islander groups, family and kin relations include Country, law and Elders, valued knowledge and traditions, mutual responsibility and reciprocity.

***Successor** refers to the new assigned member who will take over the role within the board, committee or another key group to your governance.



Step 1: Organise your duties

The goal of this activity is to organise your duties and the elements they involve. Below you will find questions to help you keep track of the key elements of your role.

Consider each of the questions and use the prompts to help you answer them. You can add your answers in the space provided, or use butcher's paper, sticky notes, or a whiteboard. Remember, there may be more than one perspective/explanation for each of these questions.

Identify your duties			
Duties	Examples	Questions to ask	Your answers
Projects	Projects or areas of work assigned to your specific role.	<ul style="list-style-type: none"> • What projects or areas are you directly responsible for? • What duties are involved within these projects? • What tasks did you complete this week? • What accumulates while you are away? 	
Stakeholders	Associated stakeholders you liaise with in your role e.g. Land councils, members, community leaders, Aboriginal Community Controlled Organisations (ACCOs), government and non-government agencies.	<ul style="list-style-type: none"> • Who do your assigned tasks serve? • Who do you collaborate with? • Who leads the projects you are involved with? 	
Resources	Resources available for related tasks e.g. templates, past reports, mutual agreements, information consent forms.	Is there a centralised location where these documents, reports, templates or relevant forms are saved?	
Knowledge	Types of knowledge that are unique and essential to your group. This may include tacit, explicit or cultural types of knowledge.	<ul style="list-style-type: none"> • What are the different explicit, tacit or cultural forms knowledge required to fulfill your role? • Does the formal description of your role accurately reflect your tasks? 	



Step 2: Prioritise your duties

The goal of this activity is to be clear on the duties/tasks that are to be transitioned to your successor as a priority. Consider these questions in relation to each of the duties identified in the previous activity.

Complete these 3 questions in relation to each of your duties. The instruction box below can assist with guiding the hand-over process with your successor.

Duty	Question	Answers
	<p>How important is this duty for maintaining the operations of your group?</p> <p>Is knowledge about this duty easily available within your group?</p> <p>How frequently do you complete tasks related to this duty?</p>	

Instructions for hand over of duties/tasks:

- Tasks/duties that are critical for maintaining the operations of your group, which are not shared knowledge and that require frequent completion are to be passed on to your successor with high priority.
- Before you leave, ensure the tasks or forms of knowledge identified with high priority are well-documented.
- If there will be a period of overlap between you and your successor, prioritise training/shadowing on high priority tasks/duties.
- For tasks/duties with moderate-low importance or urgency, you may leave instructions or record them in written documentation.
- Consider cultural protocols when passing on sensitive information to your successor, e.g. Does any knowledge contain names and images of deceased Aboriginal and Torres Strait Islander peoples and culturally sensitive materials?
- Does culturally sensitive information need further considerations around restrictions or access conditions?



Step 3: Record tacit knowledge

The goal of this activity is to record the tacit knowledge that you have acquired throughout your role of service.

Tacit knowledge refers to the knowledge, skills, and abilities gained from experience; it includes the intuitive knowledge and know-how coming from practice. It is knowledge that often resides in the mind of the individual.

Consider each of the questions, you can add your answers in the space provided, or use butchers paper, sticky notes, or a whiteboard.

Question	Answers
Is there any key knowledge about your role that has not been documented in your group's documents and procedures?	
Are there any important notes you can share with your successor? <i>(even if they are not directly connected to a specific task)</i>	
Are there any observations about the organisational culture of your group that are handy for your successor to know?	
What are some skills or qualities your successor may need to perform effectively in their new role?	

Step 4: Record cultural knowledge

The goal of this activity is to identify and record the shared cultural knowledge that informs and is unique to your group. Cultural knowledge refers to the collective beliefs, values, rules and customs that inform a group's way of life. Be sure to consider cultural protocols when passing on sensitive information to your successor.

Look out for any information that contains names and images of deceased Aboriginal and Torres Strait Islander peoples and culturally sensitive materials. Further considerations around restrictions or access conditions may need to be taken into consideration when dealing with culturally sensitive information. Be mindful that the transfer of cultural knowledge can take a long time.

Consider each of the questions. You can add your answers in the space provided, or use butchers paper, sticky notes, or a whiteboard. Remember, there may be more than one perspective/explanation for each of these questions:

Question	Answers
What are the group's shared values and how do they define priorities and goals within the group?	
Are there any cultural laws and rules that need to be communicated to your successor?	
Are there important areas of responsibility that are tied to cultural systems of family and kinship, land and sea ownership and law?	
Are there any shared meanings of 'big power words' such as accountability, responsibility, and legitimacy that are specific to your group and can differ from external stakeholders?	
<p>Is there any traditional knowledge that maintains and communicates your group's shared culture?</p> <ul style="list-style-type: none"> ◦ What is this knowledge? ◦ How is it recorded? ◦ Is it spoken, written down or shared through storytelling? ◦ Is this knowledge digital and if so, what are the considerations that come with this? 	
<p>How is traditional knowledge best shared within your group?</p> <ul style="list-style-type: none"> ◦ Are there any yarning circles? ◦ Do young members travel and walk with Elders on Country? ◦ Are there any opportunities for sharing song, stories or dances? 	
What are the group's ideas of power and authority - including cultural authority - and how should these be exercised?	
Are there any individuals and structures that may hold greater power and authority within the community?	
Who are the Elders that you engage with and are there any considerations for upholding their authority in the group's decision-making?	



Step 5: Identify important contacts

The goal of this activity is to record any specific notes when engaging and connecting with stakeholders who you have built a close relationship with. Listing these will assist your successor in taking a respectful and proactive approach to continuing the relationship, without affecting the trust and connection you have built this far with them in your role.

	Examples	Your answers
Contact	<p>Who are your external contacts? This may include community-controlled organisations, government bodies, non-for-profit organisations, institutes, community representatives, etc.</p>	
Brief history	<p>Include a brief description of your history or background with each contact.</p> <ul style="list-style-type: none"> • When was that relationship formed? • What outcomes have been achieved from this connection? • How often do you keep in touch? • Does the contact specify any preferences for communication? • Are there any cultural protocols that need to be considered when engaging with any contacts? 	
Introduction	<ul style="list-style-type: none"> • How should your successor be introduced to each contact? • Does the meeting require a face-to-face introduction or an online meeting? • When can you schedule the introductions with your successor? <p>Are there any key cultural protocols your successor should have in mind when engaging with a particular stakeholder?</p>	

After completing all the exercises from this tool you can transfer the information captured onto a centralised place. Allow for time and opportunity to discuss any further clarifications that may be required with your successor.

This tool takes inspiration from SIGMA Assessment System Inc Succession Candidate Transition Knowledge Transfer Guide