

THE ARTS ORGANIZATIONS AT A CROSSROADS TOOLKIT:
Managing Transitions and Preserving Assets

KNOWLEDGE CAPTURE AND TRANSFER TOOL

Customize as needed

Title of position:

Reports to:

Position(s) supervised:

What is the core purpose of this position, that must happen for the organization to operate?

Is this position responsible for any legal/contractual job functions (filing documents with your State, renewing leases, etc.)? If so, what are they, what are critical dates, and where can historical information be found?

Is this position responsible for any fiduciary job functions (grant applications/reports, audits, authorizing payments, etc.)? If so, what are they, what are critical dates, and where can historical information be found?

Are there other critical job functions that would be a liability if they're not carried out or would severely impact the organization's ability to operate successfully (sponsor fulfillment, regulatory requirements, donor/stakeholder relations)?

Ask questions that get at the "deep smarts" this person holds.

- What are the most critical relationships you have, and why?
- Where do you have to frequently make judgment calls?
- Where do you get the information to make sure you're in compliance?
- Etc.

For each critical job function:

- Who relies on what's produced? (Director, Board, other staff, donors, vendors)

- What do you need to perform it? (Information, software, hardware, equipment/supplies)

- Who helps you perform it? (Other staff, contractors, volunteers)

- Who are key contacts?

- Brief description/outline of how to complete the function
 - Is the "how" it's currently done *required*, or could someone else do it differently, as long as the product is achieved?

- Critical dates/time periods related to the function

- Does it require approval/authorization before completion?

- What's the most likely bottleneck to getting this done and how can that be avoided?

Are there specific skills the position needs? (software/online platforms, use of equipment, negotiation, copywriting, financial expertise, etc.)

Does this position interact with external organizations/stakeholders? If so, who, and are there related dates/events/timelines, and are there particular sensitivities?

Does this position deal with sensitive/confidential information?

Does this position direct/oversee specific technical functions (stage management, music library, sound equipment, audio/video recording of performances, etc.)? If so, where is key equipment/information located? How are the functions carried out? Who assists with the function?

Does this individual have unique historical knowledge of the organization/department/function?

Record who has completed this tool and when: