NASA Knowledge Capture and Transfer:
A Guide for the Incoming Member

STANDING ON THE SHOULDERS OF GIANTS…
Many giants have come before you! This guide was made to help a new NASA employee or person moving into a new position gather knowledge. Use this guide to facilitate a smooth transition, increase productivity, and learn from the experiences of those before you.

LONG OVERLAP

A long overlap with your successor is ideal! Request to **shadow** your precursor.

- Use the checklist on page 2 to facilitate your discussions and formulate the questions you want to ask.
- **Attend meetings** with your precursor and gradually take on a more active role.
- Ask to be **CC'd on correspondence** relating to your new position.
- Request that your precursor talk through their thought processes during daily activities. Use the "see one, do one" method and **accept constructive feedback**.

QUICK TRANSITION

Maybe you only get a day or two to complete the transition. If so, **schedule a sit down** to review this checklist.

- **Ask where information is documented** and how to access it but focus the discussion on knowledge that cannot be found in writing or that you cannot read about later.
- **Get recommendations** for other people in your organization to lean on when you have questions.

NO OVERLAP

Leaving before a successor starts?

- Is there a **continuity book** (digital or printed) or other resource available that includes information from this checklist?
- Ask your supervisor and other colleagues where to find this information.
- Request a sponsor or mentor to help guide your transition.

CONTINUITY CHECKLIST

☐ **Duties:** What are all the roles, duties, and responsibilities associated with this position?

☐ **Organization:** Is there an organization chart with names, job titles, and contact information? Who is my supervisor? Who will I supervise?

☐ **Points of Contact:** Who should I expect to interact with? What are their specific roles & how do I contact them? (If possible, ask to be introduced to frequent or important points of contact.) Who else you I contact for mentorship or advice?

☐ **References:** What documents, books, or regulations are essential to my job? Where can I find them? Are there any sections to highlight that are most often referenced?

☐ **Calendar and Tasks:** What daily, weekly, monthly, and yearly tasks will I be expected to accomplish and when are their deadlines? What important events should I attend? Is there a checklist or calendar that includes these tasks and deadlines? Are there any techniques for accomplishing these tasks?

☐ **Flow of Information:** How and from whom should I expect to receive information (emails, chatrooms, websites, meetings, etc)? Who will I commonly push information to and in what format/setting? Where is information and important documents normally stored? What programs or software should I have access to? How do I get access?

☐ **Maps and Locations:** Are there any locations, facilities, or rooms that I will need to use? How do I get access?

☐ **Equipment:** Is there any equipment that I will be responsible for or need to use for the job? Are there manuals, instructions, or videos for how to use it? Can you show me the equipment and how to use it?

☐ **Training and Development:** Are there any courses, conference, or events that are beneficial for this job? Are there any required certifications? Is there a community of practice I can join?

☐ **Troubleshooting:** Are there any recurring or expected problems to be aware of? How should I troubleshoot or find solutions?

☐ **Lessons Learned:** Do you have any stories or lessons learned to share? Is there anything you learned "the hard way"? Are lessons learned tracked? Where?

Contact your Center Chief Knowledge Officer and visit the KC&T website for more resources!