

# Knowledge Management (KM) Process Summary Template

## Purpose

This template is intended to document recurring processes and key information and insights related to those processes. Documenting recurring processes improves our organizational continuity by enabling other team members to perform these activities, and it informs potential processes improvements. This form will be stored in an all-staff repository for easy access and knowledge sharing.

Recurring processes that would be valuable to document include, but are not limited to:

- Reports (i.e., timeline and process for development, review, and submission)
- Fiscal operations (i.e., submitting, reviewing, and approving invoices)
- Data Analysis (i.e., data source, cleaning procedures, and analysis)
- Grant Applications (i.e., frequency of application if reoccurring, application portal, process for developing, approving, and submittal).
- Events (i.e., coordination with other agencies and community partners for special events)
- Volunteer onboarding (i.e., background check and reference verification procedures)
- Public Communications (i.e., development, vetting, and posting of social media or other community communications)
- Compliance training (i.e., scheduling and tracking mandatory training for all employees)

## Instructions and Use

1. Fill in the template below within 60 days of completing a recurring process. Please fill out all information applicable to the process you are documenting or write N/A as appropriate.  
***NOTE: Please refrain from including any sensitive information that would not be appropriate for all staff to have access to; if you have questions on what would be considered sensitive, please reach out to your organizations' point of contact for these processes.***
2. Please share a copy with your department's process-specific point of contact.
3. After submission, the point of contact will review to determine the appropriate file name and storage location.

## Process Overview

Process Title:	<u>Enter process name</u>
Date:	<u>Enter date document was created or updated</u>
Documenter Name:	<u>Enter your name</u>
Department:	<u>Enter your department</u>
Organization vs. Department Process:	<u>Enter if the process is used organization-wide or if this process is department specific</u>
Month/Year Performed	<u>Enter the month and year that the process was performed related to this summary documentation (e.g., April 2024)</u>
Process Timeline:	<u>Enter information on how long the process took to complete (i.e., 1-day long effort, 3-month long effort)</u>
Process Budget:	<u>Enter total process budget if applicable</u>

**Process Details**

**Description:** *Please share a brief description of the process being documented.*

**Purpose & Intent:** *Share the purpose or the intent of this process.*

**Key Stakeholders & Responsibilities:** *List names and roles of key individuals involved in this process. Please include any additional stakeholders you'd recommend engaging when conducting this process in the future.*

**Sub-Contracts:** *Indicate if there are sub-contracts with other organizations to facilitate this process.*

**Results or Outcomes:** *Share results or outcomes (e.g., changes to policies, practices, new work products) that occurred during this process.*

**Impact:** *Explain how this process contributes to the overall public health improvement plan or align with the strategic goals of the department.*

**Performance Metrics:** *Share any key performance indicators (KPIs) or other metrics used to measure the performance or effectiveness of this process.*

**Timeline & Milestones:** *List (or link documents used to track) key milestones and overarching milestones for the process. Share if milestones were met, if not, explain why.*

**Supporting Documents:** *Include links to critical files/resources related to the process including any standard operations procedures (SOPs), process maps, or guidelines associated with this process. Please share where team members find these documents.*

**Best Practices:** *Describe what worked well about this process. Share best practices you learned from this process.*

**Challenges & Solutions:** *Share any common challenges or issues you faced when completing the process. Please include recommended solutions or leading practices for overcoming the challenges.*

**Changes:** *Share any changes you would recommend to this process for the future.*

**Training & Onboarding:** *Share links to any training or onboarding materials available for new employees or team members who need to learn this process.*

**Funding:** *Share funding availability and budget allocations for positions responsible for completing this process.*

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**Feedback & Improvement:** *Explain how team members provide feedback on this process.*