



Small Public Water System Operator Resources

Knowledge Retention Tool

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Staff Turnover

- Retirement
- Take care of Family
- Return to School
- General Reasons





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Knowledge Retention Tool

The [Knowledge Retention Tool Spreadsheet for Small Water Systems.xlsx](#) (18 pp, 153 K) is an Excel spreadsheet that helps operators consolidate system information into one location, enabling increased organization and coordination among operators. Designed to assist in personnel transition, the tool encompasses a wide variety of information that a new or contract operator would need to effectively manage and operate a small water system.

Knowledge Retention

Congratulations on your new position or upcoming retirement! You play a crucial role here and we value your knowledge and expertise. To ensure that we can transition your responsibilities to one or more people after you depart, we ask that you assist us by answering the questions in this spreadsheet. Our intent is to help transition your responsibilities to different people, it is not intended to be used as a official job description as it relates to your employment. It is to ensure that none of your responsibilities are forgotten.

Please note, our system may have specific policies regarding records management and retention. Prior to filling out this spreadsheet, please be sure to consult with the management team. They will be able to provide you with supplementary instructions and information on any additional requirements.

This spreadsheet is designed to document the various actions you complete and responsibilities you hold throughout the course of your work: it is meant to serve as a recordkeeping device. For this reason, it may be beneficial to fill this out long before your last day, as it may help you to keep track of your many responsibilities in your remaining time here.

This spreadsheet does not need to be completed all at once; in fact it may help to work on it as you complete the different activities it asks about. You may find it helpful to talk to coworkers and your supervisor as you answer the questions, or to set aside some quiet time to review it. As time goes by, you'll work on and remember different components of your job.

You can keep track of when you've last updated various sections of this spreadsheet in the Handoff Checklist tab.

What's Ahead

This spreadsheet has two types of data collection:

- 1] [General, Quick Response, System Operation, and Administration](#), for key data about your responsibilities.
- 2] [Handoff Checklist](#), which is used to track the completion of the other sheets.

Instructions

Complete the information on each of the sheets along the bottom of this spreadsheet. In each, there is one or more tables to fill out. Please look for specific instructions at the top of each of these sheets regarding their contents. A few general reminders are below:

- Please complete the tables with the answers to the prompts. We have provided extra rows in case you need them.
- If you already have the information requested in another location, like a notebook or in a file folder, you can reference that location in the table. For example, "See binder labeled "Internship MOAs (G-J) on the 2nd shelf in the bookshelf." Be as specific as possible and make sure that all notebooks and folders are clearly labeled.

Contents

Progress through the spreadsheet



Sheet No.	Type of Resource	Description	Information Captured
1	Checklist	Handoff Checklist	Review and acknowledgement that everything has been documented
2	General	System Overview	General system information
3	Administrative	Documents	Important documents for system operation
4	General	People	Important contacts and their information
5	General	Source Water	Source water information
6	Quick Response	Emergencies	Emergency preparedness contacts and documents
7	Quick Response	Security	Security system information
8	System Operation	Filtration and Treatment	Water treatment mechanisms
9	System Operation	Process Monitoring and Sampling	Sampling techniques and frequencies for compliance and process monitoring
10	System Operation	Operational Supplies	Supplies used in standard operations and where they can be obtained
11	System Operation	System Maintenance	Maintenance and flushing activities
12	System Operation	Storage	Water storage information
13	System Operation	Distribution	Distribution infrastructure and information
14	Administrative	Rules and Regulations	Applicable legislation
15	Administrative	Technology	Operational system software usage
16	Administrative	Operator Certification	Operator certification information
17	Other	Neighboring Utilities	Contact and additional information about neighboring utilities
18	Other	Other Information	Miscellaneous water system information

Last Updated: 4/13/2018 15:16



Knowledge Retention Tool

knowledge_retention_tool_spreadsheet_for_small_water_systems.xlsx [Read-Only] - Excel

Tourney, Seth

File Home Insert Page Layout Formulas Data Review View Developer Tell me what you want to do

Clipboard Font Alignment Number Styles Cells Editing

E39

Handoff Checklist

[Return to Contents Tab](#)

Progress Through the Spreadsheet

*Instructions: Please enter dates when each section of the spreadsheet is completed and reviewed.
This page can be filled as you progress through the spreadsheet*

Name of Separating Employee	Seth Tourney
Job Title	
Length of Time in Position	
Supervisor	

General

Section	Date You Completed the Sheet (or enter N/A)	Date Sheet Was Reviewed by Supervisor
2. General System Information		
2. System Owner Contact Information		
3. Documents: SOPs		
3. Documents: Logs, Plans, Operations		

Table of Contents | **1. Handoff Checklist** | 2. System Overview | 3. Documents | 4. People | 5. Source Water | 6. Emergencies | 7. Security | 8. Treatment



C91 : X ✓ fx ='17. Neighboring Utilities '!C12

General: People

Seth Tourney

Fill in the below tables (8) with important contacts and their contact information

[Key Emergency Contacts](#)

[System's Staff Contacts](#)

[Lab Contacts](#)

[Contractor Contacts](#)

[Local and State Government Contacts](#)

[Neighboring Systems Contacts](#)

[Vendor Contacts](#)

[Other Key Contacts: Schools, Medical, Tribes, Media, etc.](#)

*Please note that columns may extend past the initial view of your screen.

Key Emergency Contacts (More Information on [Sheet 6](#)) [Return to Handoff Checklist](#)

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Organization (Hospital, Fire Department, etc.)	Contact Person (if applicable)	Title	Phone number	Email Address
Fire Department				

B2 x ✓ fx ='1. Handoff Checklist'!Name

System Operation: Process Monitoring and Sampling

Seth Tourney

Fill in the following tables (2) regarding various samples you collect for compliance and to ensure the treatment processes are working correctly.

[Process Monitoring Samples](#)

[Sample Collection for Lab Analysis](#)

*Please note that columns may extend past the initial view of your screen.

Process Monitoring Samples

[Return to Handoff Checklist](#)

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What sampling do you conduct within your facility?

*Please note columns may extend past the initial view of your screen.

Water Quality Parameter	When are measurements taken?	Instrument Make and Model	Calibration Frequency for Instrument	When was the instrument last calibrated?	Is there a SOP for collecting process monitoring samples?

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