DESK MANUALS

A one-page guide for building continuity resources.

● Purpose

- Ensure continuity during absences or transitions.
- Support onboarding for new hires.
- Reduce single point-of-failure risk.

● What to Include

- Position Overview: Who you are, who you report to.
- Top Responsibilities: Organized by function and frequency.
- Recurring Calendar: Deadlines and Cycles
- Critical Processes: Step-by-step for key tasks.
- Contacts & Resources: Key people and systems.
- Institutional Knowledge: Acronyms, traditions, unwritten rules.
- Workflows & Approvals: Signature/approval chains.
- Appendices: Templates, forms, org charts.

● Best Practices

- Write like you're leaving tomorrow - can someone step in?
- Use bullet points, not essays.
- Store in a shared digital space.
- Review & update annually (tie to evaluations).
- Keep a print copy for emergencies.
- Use links instead of attachments.
- Review with supervisor for accuracy.

● Common Mistakes

- Too much detail: becomes a novel no one updates.
- Storing it in a personal folder.
- Forgetting updates after staff/tech changes.
- Writing for yourself instead of a future reader.

● Tips & Tricks

- Pair a one-page summary with the full manual.
- Tie updates to predictable times (year-end, evaluations, etc.).
- Use common template across the department.