

Knowledge Transfer Template

As a member of the University community, you were given access to substantial information regarding the University's business operations and clientele. Your knowledge and experience is of immense value to us as we make decisions regarding the direction and needs of our organization.

To ensure an orderly transition of responsibilities for which you have been mainly accountable, we ask that you assist us by responding to the following questions. We recommend departing employees complete this a week before they leave.

Name: _____

Job Title: _____

Manager: _____

Last Day with Department: _____

1. Attach a Project Status Report providing a list of all projects, ongoing tasks, tips, information and other open items on which you are currently working.

2. Are there key people (internal/external contacts) other than those identified in the Project Status Report to whom we should be introduced before you leave the organization? If yes, please list and indicate when we might plan for such introductions?

3. Identify external agencies and regulatory groups (i.e., City/State/Federal) with whom it is necessary for us to interact in order to fulfill duties of your position.

4. Are there specific files/records related to current or past projects that should be retained over a defined period of time? If yes, please list, identify the location of each, and include the retention period as per State and Federal retention policies.

5. List important historical/reference documents, if any, in your possession.

6. What equipment was assigned to you for use? Where is the equipment?

7. We may need to contact you if we have additional questions. Please provide a contact name and number should we need to reach you.

8. Is there other information not requested on this form that you feel it would be helpful for us to know? If yes, please provide.

Should you need more space for any of the above items, please attach an additional typed page to this document.