

## **OFF-BOARDING KNOWLEDGE TRANSFER GUIDE**

To provide for an orderly transition of responsibilities, it is beneficial for managers to dedicate time to collaborate with a departing employee to document current/outstanding projects, upcoming deadlines, contact information for outside vendors/agencies, and other institutional knowledge that might be lost during transition. Below are some suggestions for documenting information for a smooth transition.

Consider asking the employee to provide:

1. A project status report which might include:
  - A list of all current, outstanding, and important upcoming projects, deadlines and tasks
  - A list of ongoing regular tasks
  - Open items on which the employee is currently working
  - Contact information for those with whom an employee has been working on tasks, projects, committees, etc.
2. A list of key people (internal and external) to whom someone else should be introduced before the current employee leaves their position
3. A list of external agencies or groups (including contact information) with whom the exiting employee interacts in fulfilling one's responsibilities
4. Compilation of specific files/records/emails related to current or past projects to be retained for a period of time
5. Ask the employee to save all documents on departmental shared drive