**Knowledge Transfer Plan Template**

To ensure an orderly transition of duties for which you have been mainly responsible, please respond to the following questions and return this plan to your supervisor before your depart from your role. You may customize this template by adding or removing rows/columns as needed.

|  |
| --- |
| **Employee Name:** |
| **Employee Title:** |
| **Last Day of Employment:** |
| **Knowledge Transfer Plan Due Date:** |

1. **Provide a list of all projects, ongoing tasks and other tasks you are currently working on:**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Project | Key Contacts with Knowledge of Projects | Contact Information | Status of Project | Timeline for Delivery | Special Concerns (budget, etc.) | Location of Working Files (soft and hard copies) | Notes |
|  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |

1. **Provide a list of external or client relationships/contacts:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Organization | Address | Phone | Email | Relationship Description/Notes |
|  |  |  |  |  |  |
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1. **Provide a list of WVU relationships/contacts:**
   1. **Include individuals from your unit AND across campus.**
   2. **Do introductions need to be made before you leave? If so, indicate when the introduction will be made.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Organization | Address | Phone | Email | Relationship Description/Notes |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1. **What documents do you own that should be transferred to a shared space?**

|  |  |  |
| --- | --- | --- |
| File Name | Current Location/Owner | Transferred to New Location/Owner? |
|  |  |  |
|  |  |  |
|  |  |  |

1. **To what cloud-based platforms/services do you belong?**

|  |  |  |
| --- | --- | --- |
| Platform | Are you the owner? | Password |
|  |  |  |
|  |  |  |
|  |  |  |

1. **To what committees/working groups do you belong?**

|  |  |  |
| --- | --- | --- |
| Committee Name | Committee Chair | Are they aware you are departing? |
|  |  |  |
|  |  |  |
|  |  |  |

1. **Do standard operating procedures exist for your role? If so, are they up-to-date? Please provide the location of the file and date of its last revision.**

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1. **Is there any information not specifically requested on this document that you feel would be helpful for your supervisor or team to know in regards to knowledge transfer? If yes, please use this space to explain.**

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