



Transition Plan

This transition plan is designed to ensure a smooth transition when an employee resigns from a position within the Division of Development & Alumni Relations. Employee transition plans are a living document that managers use to structure an organizational transition. Whether an employee is leaving their role or starting a new one, a transition plan can help streamline all processes involved. Overall, such plans can help managers set up actionable steps within organizational shifts and guide transitioning employees toward success.

Employee Name

When will the employee officially make their transition? What duties will be reorganized/reassigned upon the transition? What duties will be paused during the transition?

Who will be informed of the transition? How and when will the transition be communicated?

IDENTIFY DUTIES AND RESPONSIBILITIES (include whichever categories are relevant for your work)

Non-recurring [identify which duties will be reassigned or paused?]

-
-

Daily [identify which duties will be reassigned or paused?]

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-
-

Weekly [identify which duties will be reassigned or paused?]

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-
-

Monthly [identify which duties will be reassigned or paused?]

-
-
-

Quarterly [identify which duties will be reassigned or paused?]

-
-
-

Annually [identify which duties will be reassigned or paused?]

-
-
-

OUTSTANDING PROJECTS

Name of the project

- *brief description of the project and your role*
- *status of project*
- *names of colleagues involved*
- *relevant deadlines*
- *links to relevant files*
- *will this project be reassigned or paused*

UPCOMING DEADLINES

- **Date, provide description of deadline, instructions on how to meet the deadline**

KEY CONTACTS

- **Name, title, organization**
- **Email, phone number**
- **Brief description of your collaborative work**
- **Links to related files/documents**

FEEDBACK PROTOCOL AND EXIT INTERVIEW

- **Please provide feedback to help the successor be successful in this role.**
- **How can knowledge and skills be transferred to a successor?**
- **Please shared additional considerations for the successor.**
- **Consider scheduling an exit interview with Talent Management.**

COMPLETED SAMPLE TEMPLATE

Employee Name Jane Doe

When will the employee officially make their transition? What duties will be reorganized/reassigned upon the transition? What duties will be paused during the transition?

Who will be informed of the transition? How and when will the transition be communicated?

Jane's direct reports. She will tell the staff at the next staff meeting.

IDENTIFY YOUR DUTIES AND RESPONSIBILITIES (include whichever categories are relevant for your work)

Non-recurring (will these duties be reassigned or paused?)

- EXAMPLE: Represent our department in organization-wide meetings about data management. *John Doe has been assigned this duty.*
-

Daily (will these duties be reassigned or paused?)

- EXAMPLE: Circulate relevant media clips every morning to the Clips email list – see instructions for compiling clips digest saved here [LINK TO FILE PATH] *John Doe has been assigned this duty*

Weekly (will these duties be reassigned or paused?)

- EXAMPLE: Prepare and circulate agenda for departmental staff meeting – past agendas are saved here for reference [LINK TO FILE PATH] *The Director has been assigned this duty*

Monthly (will these duties be reassigned or paused?)

- EXAMPLE: Pull report from our donor database showing total donations for that month and number of new donors – report is saved in database as [NAME OF REPORT] and can be easily run by adjusting the date parameter [MAY NEED TO LEAVE ADDITIONAL INSTRUCTIONS FOR DATABASE WORK] *John Doe has been assigned this duty*

Quarterly (will these duties be reassigned or paused?)

- EXAMPLE: File quarterly lobbying report with [STATE OFFICE] – see instructions at [LINK] and past reports saved here [LINK TO FILE PATH] *This activity is paused.*

Annually (will these duties be reassigned or paused?)

- EXAMPLE: Prepare budget for our department and represent the department in organization-wide budget meetings

OUTSTANDING PROJECTS

1. [Name of project]

[brief description of the project and your role]

- [status of project]
- [names of colleagues involved]
- [relevant deadlines]
- [links to relevant files]
- [will this project be reassigned or paused]

EXAMPLE:

1. **Creating new volunteer manual:** As part of our department’s goal to simplify and streamline our volunteer onboarding process, I have been working on a new volunteer manual that integrates content from our previous materials. After doing an audit of current materials [INSERT FILE PATH TO THIS DOCUMENT] and deciding which ones are still relevant or could be eliminated, I began creating the new volunteer manual saved here [INSERT FILE PATH].
 - **Status of project:** I’m about halfway done with the new volunteer manual.
 - **Colleagues who have been involved:** Jane approved my outline of the manual. John helped write the section on logging volunteer hours because of his familiarity with the system.
 - **Relevant deadlines:** We set an internal goal of having the manual ready by the start of the next fiscal year.
 - **Relevant files:** See links above.
 - This project will be paused until we hire a new staff member.

UPCOMING DEADLINES

- **[DATE]:** [one-sentence description of deadline], [instructions on how to meet the deadline]

EXAMPLE

- **September 15:** Registration deadline for [external organization name]’s annual conference, which I have typically attended. Conference details available here [INSERT LINK].

Key contacts

- **[name], [title], [organization]**
- *[EMAIL], [PHONE NUMBER]*
- [BRIEF DESCRIPTION OF YOUR COLLABORATIVE WORK]

EXAMPLE

- **John Smith, Account Executive, Smith Designs**
johnsmith@smithdesigns.com, 555-123-4567
Smith Designs is the graphic design company that lays out our annual report. We typically contact them in September to set up the timeline for laying out the report.

FEEDBACK PROTOCOL AND EXIT INTERVIEW

Feedback Protocol

EXAMPLE

- **Please provide feedback to help the successor be successful in this role.**
Please add the successor to the Teams drive within the first two days. Most documents for this role are located under XYZ folder.
- **How can knowledge and skills be transferred to a successor?**
In addition to referencing info on Teams, I suggest the successor meet with the following staff members
- **Please shared additional considerations for the successor.**
The XYZ project is time consuming because of the number of people who must review and approve the report. The project is not due until May 1, but I strongly suggest the successor start to gather information and create the report no later than March 1. The successor can use the remaining time collecting feedback and making updates to the report.
- **Consider scheduling an exit interview with Talent Management before your departure.**