**Transition Plan Document**

*This document serves as a tool for managers/individuals to plan for departures from roles within University Life. The person departing should create the basis for the document, with support/audit from their manager. Feel free to make changes as needed.*

Outline of Responsibilities, Duties, and Tasks

*An account of the standard duties and recurring tasks of the role.*

* Daily responsibilities/tasks.
* Weekly responsibilities/tasks.
* Monthly responsibilities/tasks.
* Annual responsibilities/tasks.
* Regular or reoccurring meetings and their frequencies.
* Please share who you might deem as the appropriate person to take on interim responsibilities/tasks.

Outline of Current Projects and Initiatives

*An account of the current projects on which you are working.*

* List of outstanding projects and initiatives
  + Please include a description outlining the intended purpose of project, how much progress you have made, what the next steps might be, any important dates or deadlines, key partners (those working on project), and stakeholders (those impacted or who may have an interest in project).
  + Please also include any instructions or resources that would aid someone completing in both an interim and permanent capacity.
* Please share who you might deem as the appropriate person to take on interim projects or initiatives.

Task and/or Initiatives Planned to be Completed prior to Departure

*An account of the tasks you plan to complete before leaving.*

* A list of what does not need to be delegated or taken on during your transition.
* Please include dates for when work is likely to be completed to aid in follow-up, especially in the case it will continue after your departure.

Important Contacts, Resources, Trainings, and Offices

*An account of the contacts who could be useful to the people who succeed you, important resources and*  *trainings, as well as offices with which the role should maintain partnerships/relationships.*

* A list of the important (internal and external) contacts for the role, including contact information.
  + Can be helpful to think through each task, initiative, or project.
  + It can be helpful to just look to see the people with whom you mostly interact.
  + Also try to think of situational circumstances that may/have come up, and who to contact in those cases.