**Transition Plan 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:

Name:

Job Title:

Manager:

Last Day with Department:

Using the attached sheet, provide a list of all projects, ongoing tasks, tips, information and other open items on which you are currently working.

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?

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.

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.

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

**Reminders: Discussion Points**

Confidentiality obligations

Proprietary information & Intellectual property

Guidelines regarding Public Disclosures

Other

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

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

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.

**Transition Plan Template**

**Project Status Report**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Project | Client Contact Information | Key NYU Contacts with Knowledge of Project | Status of Project | Time Line for Delivery | Special Concerns (client, budget, safety, etc.) | Location of Working Files | Comments |
|  |  |  |  |  |  |  |  |
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