

KNOWLEDGE TRANSFER

As a member of the Tennessee State University, 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 the 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: _____

Supervisor: _____ Last Day of Work: _____

1. Provide a list of all projects, ongoing tasks, tips, information and other open items on which you are currently working or that will be coming due in the next 5 – 7 months. (Use Project Status Template below).
2. 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?
3. Identify any external agencies and regulatory groups (i.e., City/State/Federal) with whom it is necessary for us to interact in order to fulfill obligations of your position.
4. 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.
5. List important historical/reference documents, if any, in your possession.
6. Reminders: Discussion Points
 1. Confidentiality obligations
 2. Proprietary information & Intellectual property
 3. Guidelines regarding Public Disclosures
 4. Other

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Suggestion- print out front and back

- 7. What equipment was assigned to you for use? Where is the equipment?
- 8. We may contact you if we have additional questions. Please provide a contact number should we need to reach you. (____) ____ - _____
- 9. Is there any other information not requested on this form that you feel it would be helpful for us to know? If yes, please provide:

- 10. Document instruction/manual below and any other process not noted:
 - Banner:

Project Status Report

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

Reviewed and/or discussed with employee:

Supervisor: _____ Date: _____
Supervisor Signature

Supervisor to retain this form.