

WILLIAM & MARY

Tribe Knowledge Transfer Form

As part of your Offboarding process, please complete the following, and provide to your supervisor prior to your last day of work:

Employee Name _____ Employee (93#) _____

Position Title _____ Position # _____

Supervisor Name _____ Last Day of Work _____

When an employee leaves, valuable institutional knowledge that may not be reflected in formal documentation also leaves. Securing this information ensures continuity, supports a smooth transition of responsibilities, and helps identify key functions to improve recruiting, onboarding, and future planning.

1. Please list and describe any active projects you are working on that are critical or time-sensitive. If necessary, attach a Project Status Report outlining all current projects, appropriate files, ongoing tasks, and other open items.
2. Do you have any responsibilities that you regularly perform that are not included in your formal job description? Please describe.
3. Please list key internal and external contacts, including their contact information, who would be valuable resources for your successor. Indicate any individuals to whom introductions should be made prior to your departure.
4. Please share any other relevant information not addressed in this form that would be helpful to support a smooth transition.