DIVISION ROLE TRANSITION PLAN TEMPLATE

OUTGOING	ROLE EXIT DATE	INCOMING	NEW ROLE START DATE
CURRENT ROLE	**NEW ROLE**	**CURRENT ROLE**	**NEW ROLE**

INCUMBENT KNOWLEDGE TRANSFER REQUIREMENTS			
KNOWLEDGE / SKILL	TRANSFER METHOD	INCUMBENT/SUCCESSOR RESPONSIBILITIES	TRANSFER TIME FRAME

ROLE TRANSITION CHECKLISTS

ACTIVITY TYPE	OVERSEEN BY	
SUCCESSOR NEW ROLE ORIENTATION	OUTGOING DIVISION LEADER	
ACTIVITY DESCRIPTION	COMPLETION DATE	COMMENTS
Discussion between successor and new manager of new position, needs, and expectations		
Training requirements for new position discussed and executed or in progress		
Provided relevant division information		
Provided projects, initiatives, and tasks information		
Provided volunteer contact information		
Provided location of pertinent documents and records		
Provided lists of pertinent contacts		
Notified current division leaders of role change		
Notified IPPA of role transition		
Notified external contacts/other division leaders		
Exchange / reset processed of relevant system IDs and passwords		
New team introductions / meetings carried out		

ADDITIONAL PLAN INFORMATION	e.g. Alternative Arrangements, Changes to Position, etc.		
DETAILS	**DATE EFFECTIVE**	**IMPACT**	**COMMENTS**