



Exit Memorandum

Date: [Date of sending]

Memo To: [Individuals or Departments the memo is sent to]

From: [Your Name and Title]

Introduction

Provide a summary of this memo in one or two paragraphs, highlighting the change that is happening, when it is effective, and what the key takeaways are for the memo recipient.

Dear [NAME OF SUPERVISOR],

As we discussed, my last day in [CURRENT TITLE] will be [DATE]. This transition plan lays out my regular duties and responsibilities, outstanding projects, upcoming deadlines, and key contacts.

This document is saved in [LINK TO FILE PATH], and I will leave a few hard copies on my desk on my last day.

Best,

[YOUR NAME]

Regular Duties and Responsibilities

Focus on main responsibilities that need to be taken of in order for the work you do to experience as little interruption as possible. Include any recurring duties and meetings. You can also note any colleagues who have assisted you with certain responsibilities and are already familiar with those areas of your work.

Non-recurring

- EXAMPLE: Represent our department in organization-wide meetings about data management

Daily

- EXAMPLE: Circulate relevant media clips every morning to the Clips email list - see instructions for compiling clips digest saved here [LINK TO FILE PATH]

Weekly

- EXAMPLE: Prepare and circulate agenda for departmental staff meeting - past agendas are saved here for reference [LINK TO FILE PATH]

Monthly



- EXAMPLE: Pull report from our donor database showing total donations for that month and number of new donors - report is saved in database as [NAME OF REPORT] and can be easily run by adjusting the date parameter [MAY NEED TO LEAVE ADDITIONAL INSTRUCTIONS FOR DATABASE WORK]

Quarterly

- EXAMPLE: File quarterly lobbying report with [STATE OFFICE] - see instructions at [LINK] and past reports saved here [LINK TO FILE PATH]

Annually

- EXAMPLE: Prepare budget for our department and represent the department in organization-wide budget meetings

Outstanding Projects

Title, Description, Status, Colleagues Involved, Deadlines, and Links to Relevant Files

If there is a major project, you may want to make a separate plan that someone can follow step by step.

EXAMPLE:

Creating new volunteer manual: As part of our department's goal to simplify and streamline our volunteer onboarding process, I have been working on a new volunteer manual that integrates content from our previous materials. After doing an audit of current materials [INSERT FILE PATH TO THIS DOCUMENT] and deciding which ones are still relevant or could be eliminated, I began creating the new volunteer manual saved here [INSERT FILE PATH].

- *Status of project:* I'm about halfway done with the new volunteer manual.
- *Colleagues who have been involved:* Jane approved my outline of the manual. John helped write the section on logging volunteer hours because of his familiarity with the system.
- *Relevant deadlines:* We set an internal goal of having the manual ready by the start of the next fiscal year.
- *Relevant files:* See links above.

Major upcoming deadlines

While you'll note upcoming deadlines associated with your projects in the previous section, there may also be stand-alone deadlines. For example, a quarterly deadline to file forms with the State.

List due date and manner of deadline (e.g., someone needs to send an email to specific person).

- *[DATE]:* [ONE-SENTENCE DESCRIPTION OF DEADLINE], [INSTRUCTIONS ON HOW TO MEET THE DEADLINE]



EXAMPLE

- *September 15*: Registration deadline for [EXTERNAL ORGANIZATION NAME]'s annual conference, which I have typically attended. Conference details available here [INSERT LINK].

Key Contacts

Who will people need to be in touch with to execute the duties and take over the projects I've described in this transition plan? Who would your successor want to reach out to first when they come on board? Consider internal and external contacts.

- [NAME], [TITLE], [ORGANIZATION]
- [EMAIL], [PHONE NUMBER]
- [BRIEF DESCRIPTION OF YOUR COLLABORATIVE WORK]

EXAMPLE

- John Smith, Account Executive, Smith Designs
- *johnsmith@smithdesigns.com, 555-123-4567*
- Smith Designs is the graphic design company that lays out our annual report. We typically contact them in September to set up the timeline for laying out the report.