

KNOWLEDGE RETENTION & TRANSFER (KRT) MODEL



HANDOVER MEMO TEMPLATE

Document Overview

NOTE: The section topics and the details included in each section are illustrative—adapt them to your context.

Handover Memo for **[incoming officer/staff name and position title, office]**

From: **[outgoing officer name and position title, office]**

Date: **[Month Day Year]**

This template includes instructions and some examples in blue. Fill out the template and replace all text in blue.

PRIOR TO LEAVING:

HIGH-LEVEL PRIORITY tasks and deliverables that I plan to complete before departure:

Actions	Tasks and Deliverable(s)	Primary POC
Important Office and OU Documents	List any important documents about the operating unit and/or office. Include the Organizational Chart, All Staff Directory, any Office Calendars, clearance/approval trackers, etc.	
Important Team Documents and Folders	<ul style="list-style-type: none"> ● Upload all documents for activities where you served as AOR/COR or activity manager. ● List all important documents or files for the successor or the office. It is important to include any documents that will require continued work after you have departed. ● Organize hard files and provide a list with names to your Office Assistant. ● List any documents related to the team/office/organization's strategy. 	<ul style="list-style-type: none"> ● If identified issues, please refer to the successor to the person(s) that may be able to provide assistance, context, and background.
Introduce new staff to key contacts	<ul style="list-style-type: none"> ● List key contacts and include their role and area of technical expertise and any activities they are leading or involved in. ● Schedule time to reach out to contacts and schedule meetings for in-briefings. 	<ul style="list-style-type: none"> ● Consider creating a spreadsheet and linking it here. ● List other staff who may assist with the introductions.
Activity Management	<ul style="list-style-type: none"> ● List any grants, contracts, cooperative agreements or G2G activities in which you have a role and include pertinent details. ● Update all documents with current and new activities, update budget tables and hold meetings with acquisition and assistance staff to answer any questions they have on new activities. 	<ul style="list-style-type: none"> ● If there are many activities, consider creating a sheet in the spreadsheet with the key contacts and include the information.
OTHER		

HIGH-LEVEL PRIORITIES waiting for successor’s action

Activities	Tasks and Deliverable(s)	Primary POC
Orientation/Training	<ul style="list-style-type: none"> • XX will serve as Acting to cover position Y upon departure • [Successor] will be given XX weeks to complete your orientation/training at post • XX will continue to cover the position while [successor] is completing orientation/training 	<ul style="list-style-type: none"> • If identified issues, please refer incoming staff to the person(s) that may be able to provide assistance, context, and background.
The Team: XXXX Program Assistance	<ul style="list-style-type: none"> • Provide a list of team members and their main workstreams or activities. • For information about strengths and areas for improvement, please create a separate password protected document or spreadsheet. This is where you can share your completed staff evaluations and interim evaluation report. 	
CDCS 2020-2025	<ul style="list-style-type: none"> • Transfer ownership of documents and folders to the incoming staff or someone on the team. 	<ul style="list-style-type: none"> •
ANY additional actions that need to be completed as a priority		

WORK COVERAGE AFTER DEPARTURE

Activities/Topic	Responsibilities and tasks	Suggested coverage	Timeframe
[EXAMPLE]	<ul style="list-style-type: none">• Include specific tasks you normally do yourself or with others.• You might also explain where this task comes from and the repercussions of not completing the task.• Names of colleagues who can provide the successor with support – include details regarding what kinds of support on which areas of work.		

CURRENT AND SHIFTING PRIORITIES

CURRENT AND SHIFTING OFFICE/DIVISION/TEAM PRIORITIES

[EXAMPLE]	[IMPACT ON THE PORTFOLIO]	[RECOMMENDATIONS]
Provide an introduction that relates to the team or office.	Provide more details on how this impacted your portfolio and how you responded to the shifting priorities	Provide recommendations on actions to consider in the future and who could be an important resource

CURRENT AND SHIFTING ORGANIZATIONAL PRIORITIES

[EXAMPLE]	[IMPACT ON THE PORTFOLIO]	[RECOMMENDATIONS]
Provide an introduction that relates to the Mission	Provide more details on how this impacted your portfolio and how you responded to the shifting priorities	Provide recommendations on actions to consider in the future and who could be an important resource