



### Transition Report Checklist

**Purpose:** the transition report ensures that the person taking over your position will be well prepared and have a good sense of what you have worked on and what projects they will work on. The checklist below should be used as a guide in creating your transition report – we encourage you to adapt it as you see fit for your position:

Section	Include	Status
Introduction	Personal reflections on the position/role/program	
	Vision, mission, goals, and position responsibilities	
	Other:	
Table of contents	Page numbers (best to create this at the end)	
Body	Title, headings, subheadings, bullet points	
	Other:	
Individual sections	Short description of what was done	
	Logistics of main project/role components	
	Project specific timelines	
	Summary evaluation of project	
	New initiatives and recommendations at the end of each section with rationale	
	Contact for each section/project and preferred method of contact	
	Electronic or physical location of relevant documents	
Reference materials/appendix	Other:	
	Reference manuals or guides	
	Important links	
	Screenshots, samples and examples	
	Office layout, codes, password, supplies, etc.	
Review report with supervisor	Other:	
	Make changes, if necessary	