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 |  |
| Other: |  |
| Reference materials/appendix | Reference manuals or guides |  |
| Important links |  |
| Screenshots, samples and examples |  |
| Office layout, codes, password, supplies, etc. |  |
| Other: |  |
| Review report with supervisor | Make changes, if necessary |  |