# Transition Planning

Directions:Use this checklist as a guide to think through the transition to your previous position or to the permanent leadership position. Record your thoughts for each item. You can adapt any of these to meet your unique needs.

|  |  |  |
| --- | --- | --- |
| Transitioning out of the interim or acting role | | |
| **✓** | **Things to Think About** | **My Notes and Reflections** |
|  | Tie up loose ends | What can I reasonably complete before transitioning back to my regular position? What, if anything, must absolutely be completed by me? |
|  | Identify opportunities | Have I noticed any opportunities that could be prioritized by the next leader? |
|  | Key relationships | Whom should the new leader know? |
|  | Important information | What important or sensitive information do I need to convey to the new leader? |
| Transitioning into the leadership role | | |
| **✓** | **Things to Think About** | **My Notes and Reflections** |
|  | Transition from your previous role | How will your previous role be filled? |
|  | Communication | Who will announce your selection? |