3.1 Transition of Assets Checklist (version 05/2013)

If there is an incumbent grantee from whom you are taking the baton, facilitating a smooth handover will improve your effectiveness and success in your new role. This checklist provides you an inventory of what to consider and discuss with the incumbent to ensure the knowledge and assets are transferred successfully.

**Topics for Discussion**

- What are the routine tasks that you do on a daily basis that need to continue? Monthly? Quarterly? Annually? Examples could include: retreats, newsletter, directory updates, annual reports, data collection or reports, etc.

- Is there any work-in-progress that you need to be aware of? What are the expectations, timelines, and relevant players?

- Is there any pertinent history that you should know about? Land mines? Difficult personalities? Short cut processes? “Go to” people? Protocols?

- Are there data collection procedures that you need to learn? Definitional treatment of data fields?

- What about hard mail? Email accounts?

- Are there any key relationships that need to be transferred? Can the incumbent do an email introduction and provide a contact list?
  - Vendors, e.g., website support, communications, etc.
  - Admin support
  - Facilities & storage
  - Funders
  - Grant writers
  - Press
  - Partners: Local WIBs, economic development partners, K-12 partners, industry partners, researchers
- “Go to” people at each college campus to get things done
- If applicable, unfunded centers with affiliate status
- Other

□ Is there a “contact” database that needs to be transferred? What is the password and URL? Who is getting invoice? What does the licensing cost?

- Website
- Listservs

□ Are there hard assets that need to be transferred?

□ Do you need to contract the incumbent to stay on for a period of time

□ Is there a wrap up meeting? Can you attend to offer comments to acknowledge the contributions of the incumbent.

□ If there are questions that arise, what is the email and cell phone number of the incumbent? Is it ok to call and ask questions? Who else can mentor you?