

## Worksheet: Suggested Guidelines for an Outgoing Executive Director's Transition Memo

1. Briefly describe the **history and growth** of the organization including major accomplishments, challenges and key developments and/or major strategic decisions and rationale.
  
2. Summarize **major trends** in the field and clarify the **organization's current strategic vision and theory of change**.
  
3. **Briefly describe all programs**, including major contract deliverables for each and timelines/deadlines. Additionally, provide your assessment about program strengths, challenges and priorities (e.g. staffing, outreach, program design, evaluation, partnerships, etc.) and future course (e.g. incubate, maintain, grow, divest, etc.)
  
4. Provide a brief **infrastructure assessment** (e.g. human resources, fiscal management, fund development, information systems and technology, administration, etc.)
  
5. **Provide recommendations on core priorities for the coming year** in all major areas such as public education and outreach, organizing and advocacy, partnership and alliances, strategic communications, program development, fiscal management, fund development, donor relations, board relations, human resources, information technology and other infrastructure areas as needed.
  
6. **Attach key documents** such as: annual operating plan and budget, program work plans, budgets and description of contract deliverables, fund development plan, etc. Make sure to develop electronic folders using Dropbox, Google docs or some other service to organize key documents for the incoming ED.

