

Departures/Arrivals Transition Checklist

Departures – Documents to Gather

Personnel

- _____ Succession Plan
- _____ Organization Chart
- _____ Personnel Policies
- _____ Procedure Manuals
- _____ Staff List (contacts, positions, status/salary)
- _____ Salary Schedule
- _____ Job Descriptions
- _____ Job Duties
- _____ I-9 Files
- _____ Medical Files
- _____ Personnel Files
- _____ Health Insurance
- _____ Pension information
- _____ Union Contract (if applicable)

Finances

- _____ Budgets (current, past and supporting documentation)
- _____ Monthly Financials
- _____ Levy Documents
- _____ Audits/Auditor Information
- _____ Bond information and Bond disclosure documents
- _____ Account login info for electronic access
- _____ Banking/Credit card information
- _____ Internal Controls Procedures
- _____ Outside account contact information and procedures (if applicable)
- _____ E-rate docs (if applicable)

Board

- _____ Contact Information
- _____ Board By-Laws and Library Policies
- _____ Board Minutes
- _____ Records Retention documents
- _____ Annual Timeline of tasks/events
- _____ Strategic Plan
- _____ Current Projects List

Building

- _____ Capital Improvement Plan
- _____ Master Plan
- _____ Emergency Plan
- _____ Blueprints/As-Builts
- _____ Vendor Contacts
- _____ Contracts Database
- _____ Liability Insurance Policy and Contact/Claims information
- _____ FFE (furniture, fixtures, equipment) documents and depreciation schedules

Technology

- _____ Tech Replacement Plan
- _____ Inventory List
- _____ Login/passwords list
- _____ Website/Social Media login/passwords and procedures information

Community

- _____ Local contact information
- _____ Library networking information

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Arrivals -Training Checklist and Topics to review

- _____ New Director Overview Letter- explain where to access key information
- _____ Training schedule

Meetings

- _____ Meet with each staff member (and union stewards if applicable)
- _____ Meet with each board member individually and then as a group
- _____ Meet with key community people (school superintendents, police, fire, mayor/local officials)
- _____ Meet with major building vendors (Mechanical, plumbing, fire protection, HVAC)
- _____ Meet with other vendors (collections, IT, attorney, accountant/auditor)
- _____ Meet with other local directors
- _____ Meet with local, state, and federal legislators

Building

- _____ Walk through of building and grounds
- _____ Blueprints/As-Builts
- _____ Capital Improvement and Master Plan review
- _____ Emergency Plan Review
- _____ Emergency Procedures walk through
- _____ FFE (furniture, fixtures, equipment) and depreciation schedules

Technology

- _____ Tech Tour (walk through server room and locate all equipment in building)
- _____ Inventory List
- _____ Technology Plan Review
- _____ Login/Passwords
- _____ Website/Social Media login information

Personnel

- _____ Where evaluations/disciplinary/attaboys documents are
- _____ Pertinent staff issues
- _____ Location of electronic staff files
- _____ Current staff projects
- _____ Union contract (if applicable)

Board

- _____ Overview of board members
- _____ Board packet timeline and preparation
- _____ Current projects & Pending projects
- _____ Past, pending, current lawsuits
- _____ Strategic Plan review

Financials

- _____ Budget and tax levy process
- _____ Vendor Files
- _____ Financials and how they are prepared incl AP/AR
- _____ Audit timeline
- _____ Bond Information and bond disclosure documents
- _____ Current and pending grants incl e-rate documents

Community

- _____ Local contact information
- _____ Annual events and library participation
- _____ Library networking groups