HR Collier Board Transition – Key Questions to Consider and Discuss

Board Position: ____________________________________________

Outgoing Director: _________________________________________

Incoming Director: _________________________________________

Checklist Completion Date: ________________________________

Primary and Secondary Collaborators:
  o Which HR Collier Board Members do you work most closely with?
    ▪ Describe the when, where, how and why you work together.
  o Do you work closely with any non-HR Collier Board Members?
    ▪ Provide names, contact info and context for working together.

Do you work with any Technology / Systems?
  o Name the type of application, system, technology that you use.
  o Do usernames / passwords need to be set up or changed?

Do you work with any Report(s)?
  o Discuss type(s) and frequency of Reports
  o What is the source of the Reports?
    ▪ Do you receive or generate the reports?
    ▪ Describe nature of the reports.
    ▪ Provide any required contact info

Describe Current Projects or Initiatives
  o Identify Status: Temporary, Ongoing?
  o Importance: Urgent, Important, Discretionary
  o Are there any deliverables or special considerations?

Do you have any historical documents, files or records that need to be transferred to the HR Collier Google Drive?

What are some of the greatest challenges / obstacles that you faced while performing your role?

What do you consider to be the greatest opportunities / successes relative to the position?

Other important matters, notes, comments