

# Actions to Help Smooth Transitions

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## Checklist of Activities for the Outgoing CIO

- \_\_\_\_\_ **1 Prepare the Incoming CIO for a Listening Tour**
  - Name non-obvious leaders and “influencers” with whom the CIO should speak
  - Identify major campus projects with which the new CIO should be familiar
  
- \_\_\_\_\_ **2 Create a List of Major Systems and Key Contacts for Each System**
  - Identify who should be contacted in case of generic questions or emergency situations
  - Report any ongoing discussions about potential major systems changes
  
- \_\_\_\_\_ **3 Describe the Structure and Processes for IT Governance**
  - Relate how major IT decisions are made and how resources are prioritized
  - Identify IT governance committee members
  
- \_\_\_\_\_ **4 List the Timing and Nature of Important Standing Meetings**
  - Describe the expectations and responsibilities of the CIO at these meetings
  - Recount key discussions from recent meetings with which the new CIO should be aware
  
- \_\_\_\_\_ **5 Provide the Current IT Strategic Plan and Institutional Strategic Plan**
  - Describe what was and what was not achieved from the IT strategic plan
  - Include documents from the creation process (e.g., meeting notes, goal cascades)

Source: EAB interviews and analysis.