

Principal Transition Checklist and Interview Guide

(To be completed by the Administrator/Advisor and new principal in conference with the exiting principal or someone from the district office.)

School _____ New

Principal _____ Exiting

Principal _____ Administrator _____

Date _____

Part I: Document Checklist-To ensure an effective transition between principals, please discuss the following items with your successor and provide copies of all related documents.

Information	Discussed Item	Document Location
<u>CURRICULUM/ INSTRUCTION/ ASSESSMENT</u>		
SCHOOL REPORT CARD/ EXPANDED REPORT CARD (if applicable)		
Notes		
CURRICULUM AND INSTRUCTION DOCUMENTS		
Notes		
TEXTBOOK INVENTORY AND PURCHASES		
Notes		
ASSESSMENT DATA RESULTS		
Notes		

SUMMER PROFESIONAL DEVELOPMENT		
Notes		
<u>PERSONNEL AREAS</u>		
STAFFING DOCUMENTS		
Notes		
STAFF HIRING/TRANSFER INFORMATION AND ALLOCATION OF FUNDS		
Notes		
STAFF LISTING/ PHONE NUMBERS/ADDRESSES		
Notes		
LEADERSHIP ROLES/ STAFF RESPONSIBILITIES		
Notes		
STAFF DUTY SCHEDULE		
Notes		
STAFF EVALUATIONS		
Notes		

EXTRACURRICULAR/ ASSIGNMENT LISTS		
Notes		
<u>FISCAL AREAS</u>		
BUDGET DOCUMENTS E.G. LATEST AUDIT		
Notes		
GRANT DOCUMENTS		
Notes		
<u>PLANNING/PROCEDURES</u>		
COMPREHENSIVE SCHOOL IMPROVEMENT PLAN		
Notes		
TITLE I PLAN, AUDITS, AND/OR REVIEWS		
Notes		
PROFESSIONAL DEVELOPMENT PLAN		
Notes		
STAFF AND STUDENT HANDBOOKS		
Notes		

SBDM POLICIES, BYLAWS, PROCEDURES, MINUTES, MEMBERS		
Notes		
DISCIPLINE PLAN		
Notes		
TEAM PLANS AND CLASSROOM PLANS		
Notes		
FIRST DAY PROCEDURES (E.G. ARRIVAL, DISMISSAL, AND SUPERVISION)		
Notes		
TRANSPORTATION PROCEDURES		
Notes		
STAFF AND STUDENT SCHEDULES E.G. MASTER		
Notes		
CUSTODIAL SUMMER SCHEDULE AND BUILDING PROJECTS		
Notes		

STATUS OF PRINCIPAL COMPUTER ACCESS/NEW PRINCIPAL EMAIL AND ACCESS		
Notes		
<u>SAFETY/SECURITY</u>		
SAFE COMBINATION		
Notes		
KEYS AND CODES FOR NEW PRINCIPAL		
Notes		
SECURITY CODE AND COMPUTER ACCESS		
Notes		
LIST OF KEY HOLDERS AND SECURITY CODES		
Notes		
CONTACT INFORMATION FOR LOCAL POLICE AND EMERGENCY PROVIDERS		
Notes		

<u>PARENTS/COMMUNITY</u>		
PTA DATA AND IMPORTANT NAMES/CONTACT INFORMATION		
Notes		
COMMUNITY CONTACTS AND RELATIONSHIPS		
Notes		
NEWSLETTER SAMPLES AND INFORMATION		
Notes		

Part II: What are the next steps for the new Principal?

Part III: Contact information for exiting Principal, if available, for future questions.

