

**Assessment Institute 2024**

**The Hand-Off:  
Transitioning to a New  
(Gen Ed) Assessment  
Coordinator**

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# Agenda



**Challenges of assessment coordinator transitions**



**Preparing for a transition**



**The progressive hand-off**



**Pre-meeting**



**The final hand-off**

# Common Challenges of Assessment Coordinator Transitions



## **Assessment expertise**

Assessment itself,  
related technology



## **Documentation**

Availability of details  
about past practices



## **Relationships**

Program-internal  
dynamics, cooperation



## **Timeline**

Of coordinator appointments vs.  
assessment cycle deadlines



## **Project management skills**

Organization, timely  
communication, accountability

# Preparing for a Transition

## Assessment expertise



Create/Link to training materials, opportunities

## Documentation



Organize in a central, shareable digital space

## Relationships



Make introductions, share collaboration and conflict resolution strategies

## Timeline



Share deadlines frequently to mitigate mid-cycle transitions

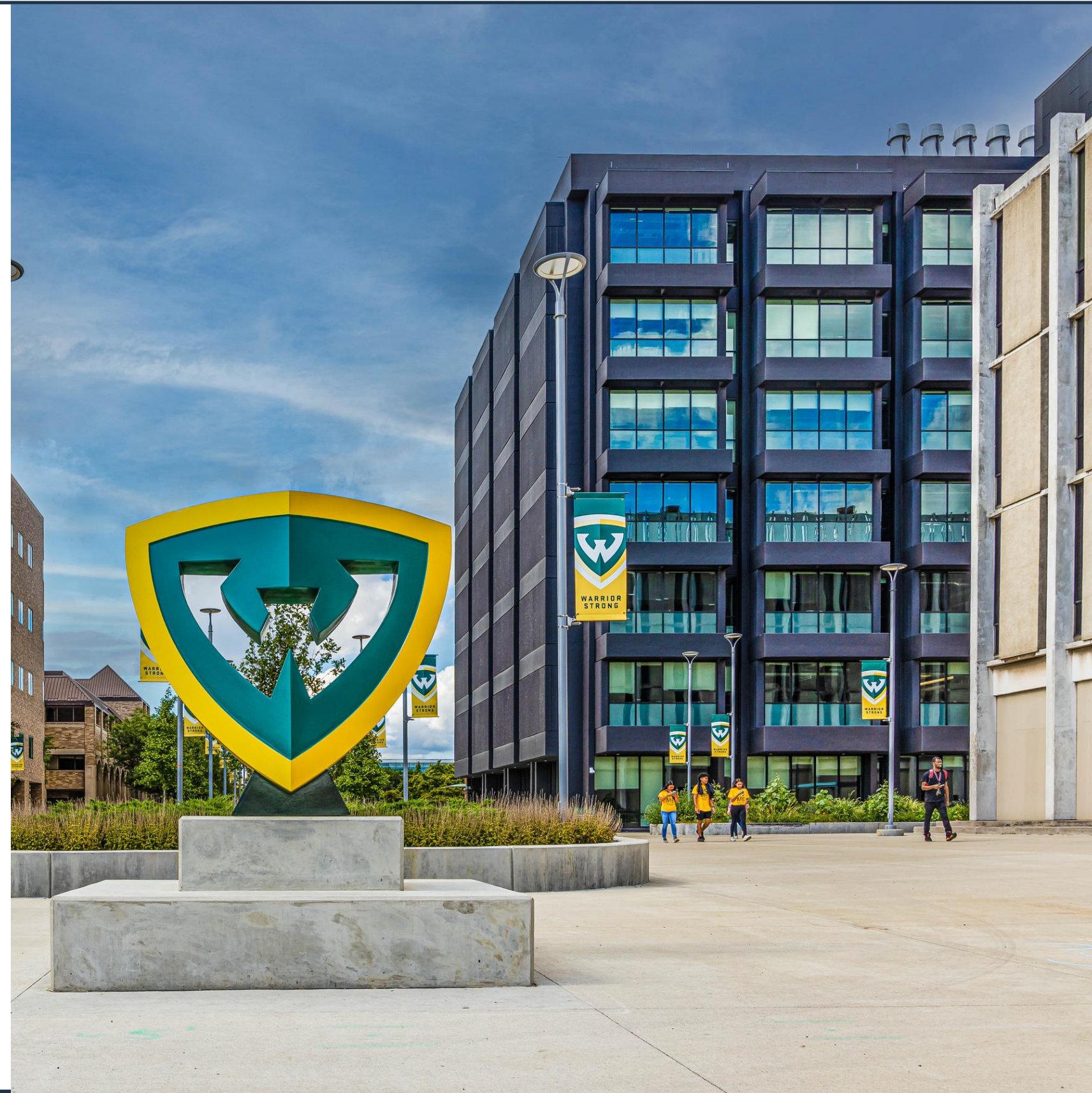
## Project management skills



Raise awareness, encourage proactive planning

# The Progressive Hand-off

1. Invite the new coordinator to shadow the exiting coordinator ahead of the transition.
  - Provide context for the design and implementation of processes to build understanding of implicit or explicit constraints and opportunities.
2. Ask the new coordinator to progressively take responsibility for tasks they have shadowed.
3. Remind the new coordinator of the available documentation, templates, training resources, etc.



# Pre-meeting

In the background, help the new coordinator prepare for next steps, meetings, and deadlines.

**Key topics to discuss:**  
Goals, rationale, timing, requirements of upcoming tasks, tools and access needed to carry them out, people with whom to engage, the timeline for doing so, and relevant policies and historical context



# The Final Hand-Off



## Strategy 1: Preparation

Build assessment expertise, organize and share documentation, facilitate key relationships, highlight timelines, encourage proactive planning and communication.



## Strategy 2: Progressive hand-off

Invite shadowing, a gradual shift of responsibilities, and frequent review of existing documentation and resources.



## Strategy 3: Pre-meeting

Work behind the scenes with the new coordinator as needed to plan for or respond to common events in the assessment cycle.

# Thank You!



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