

CoC Leadership Transition Checklist

Works of Heart Consulting | Protect operations, compliance, deadlines, and institutional knowledge

Use this when: A CoC Director, Collaborative Applicant lead, HMIS leader, CE manager, or other key system staff member is leaving, changing roles, or carrying knowledge that is not yet documented.

First 72 Hours

✓	Readiness Item	What Good Looks Like	Owner / Notes
☐	Identify all time-sensitive federal and local deadlines	Competition, APRs, SPM/LSA, PIT/HIC, monitoring, board, renewals, contracts, and reporting dates are visible.	
☐	Confirm system access	e-snaps, HDX, Sage, HMIS admin, HUD Exchange, LOCCS-related workflows, shared drives, email groups, Zoom, survey tools, and local platforms have authorized coverage.	
☐	Name interim decision authority	Staff and partners know who can approve, submit, convene, and communicate.	
☐	Preserve files and records	Shared-drive ownership, email records, templates, scoring tools, reports, and working files are secured.	

Knowledge Transfer

✓	Readiness Item	What Good Looks Like	Owner / Notes
☐	Create a recurring-operations calendar	Monthly, quarterly, annual, and competition-cycle tasks include lead time, owner, dependencies, and outputs.	
☐	Document key workflows	NOFO, Rank & Review, monitoring, HMIS reporting, PIT/HIC, SPM/LSA, CE meetings, board preparation, provider communication, and issue escalation are written down.	
☐	Build a contact map	HUD contacts, HMIS vendor, board leadership, funded projects, local government, DV providers, outreach, youth partners, funders, and	

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		technical partners are current.	
☐	Capture known unresolved issues	Data-quality problems, monitoring findings, provider conflicts, grant amendments, staffing gaps, policy questions, and pending decisions have status and owner.	

Governance & Compliance

✓	Readiness Item	What Good Looks Like	Owner / Notes
☐	Confirm Collaborative Applicant / HMIS Lead / CE roles	Formal designations and operational reality match.	
☐	Review board and committee calendar	Quorum, required actions, elections, approvals, and policy reviews are not lost during transition.	
☐	Check monitoring and corrective-action status	Open findings and promised follow-up do not disappear with departing staff.	
☐	Review current grant agreements and approved applications	Incoming leadership knows what HUD actually approved, not just how the program has historically operated.	

HMIS & Data Continuity

✓	Readiness Item	What Good Looks Like	Owner / Notes
☐	Confirm HMIS administrative coverage	System administration, user support, data quality, reporting, privacy/security, vendor contact, and backup coverage are assigned.	
☐	List upcoming data submissions	APR, SPM, LSA, PIT/HIC and any local/state reports include owners and internal deadlines.	
☐	Document known report logic and local workarounds	Critical institutional knowledge around exports, corrections, project setup, and data-quality quirks is recorded.	

Coordinated Entry Continuity

✓	Readiness Item	What Good Looks Like	Owner / Notes
☐	Identify who owns daily CE operations	Access, assessment, prioritization, referral, case	

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		conferencing, vacancy/match workflow, escalation, and provider communication have coverage.	
☐	Preserve CE policies and current exceptions	Written policy matches actual practice; temporary exceptions are documented.	
☐	Review waitlist / priority-list operations	No participant-level workflow depends on one person's spreadsheet, memory, or inbox.	

Stabilization Plan

✓	Readiness Item	What Good Looks Like	Owner / Notes
☐	Create 30/60/90-day priorities	Critical compliance first, system stabilization second, improvement work third.	
☐	Set transition communication cadence	Board, providers, staff, and partners know when and how updates will be shared.	
☐	Schedule a post-transition systems review	After urgent continuity is secured, assess governance, staffing, backup coverage, documentation, and process improvements.	

Primary Sources

- **24 CFR 578.7 - CoC responsibilities:** <https://www.ecfr.gov/current/title-24/subtitle-B/chapter-V/subchapter-C/part-578/subpart-B/section-578.7>
- **24 CFR 578.103 - Recordkeeping requirements:** <https://www.ecfr.gov/current/title-24/subtitle-B/chapter-V/subchapter-C/part-578/subpart-F/section-578.103>
- **FY 2026 HMIS Data Standards Manual (effective October 1, 2025):** <https://files.hudexchange.info/resources/documents/HMIS-Data-Standards.pdf>

Use note: This resource is an operational aid, not legal advice or an official HUD determination. Always check the applicable competition notice, grant agreement, approved application, HUD instructions, and current regulations before relying on a checklist item.