

## Tool: Forest Service Handover Memo

### Summary

The Forest Service's handover memo process enables an outgoing agency leader to share information with their replacement. The memo documents important relationships and collaborative work.

### Keys to Success

Written documentation of collaborative efforts and key community relationships, consistent use of the handover memo tool by the agency

*"Our ability to solve natural resource related problems over the long run depends on the quality of our long-term relationships."  
—Dale Bosworth, former Chief of the Forest Service*

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### Handover Memo Eases FS Staff Transitions

The challenge of rotating Forest Service line officers is a well-known barrier to community and forest-level collaboration. It takes time to develop good relationships, and when a key agency contact is transferred, a collaborative effort can stall out while community members establish rapport with the new person.

In 2006, (former) Chief Dale Bosworth issued a directive to Forest Service employees to use a leadership transition process when leaving their post. Specifically, he asked those in key leadership positions-- Forest Supervisors, District Rangers, Research Program Leaders, State and Private Forestry field representatives, and Staff Directors at national and regional levels who work extensively with partner and cooperator networks-- to prepare a handover memo for the incoming employee.

In the handover memo, the outgoing agency leader provides information critical for the new person to be successful in doing their job. The memo describes relationships with partners, collaborative efforts underway, commitments that have been made, and any work agreements or procedures that partners are using with the agency/unit.

As stated in the attached template, the purpose of the handover memo is not only to communicate between the departing and new leader, but also to inform and involve agency staff and superiors who will continue to support collaborative efforts in the interim and into the future.

### Benefit

The handover memo enables a new Forest Service leader to honor the commitments made to the community by their predecessor, and for the agency to maintain momentum on collaborative efforts despite changes in personnel.

## Transition Management of Agency Personnel

### *Tool: “Handover Memo”*

**Purpose-** Today, communities of place, local governments and other groups are increasingly convening and facilitating collaborative efforts that directly involve our agency. In turn, our agency is recognizing the need for improved transitions between outgoing leaders and incoming leaders who will assume the responsibility for working directly with the public and partners. Good transition management between the agency leader these groups have been working with, and the leader they will now rely on, is especially important. Our ability to solve natural resource related problems over the long run depends on the quality of long-term relationships between agencies, other organizations and the public. Often, what makes collaboration work is a combination of formal and informal working agreements and commitments between various participants.

The purpose of this “Handover Memo” is to help communicate these agreements and commitments, not only between the departing leader and the new leader, but also to inform and involve agency staff and superiors who will continue to support such cooperative efforts in the interim and into the future. The very act of writing or finalizing this memo will emphasize the importance of, and pass along a better understanding of the relationships and cooperative efforts you have helped develop, so they can continue to grow and evolve.

### **Template**

**To:** Address memo to the new agency unit leader and any interim leaders.

**From:** Completed by you as the outgoing leader prior to your departure. At a minimum, memo should be developed with the participation of your primary staff. At your discretion, you may find it useful to also have others review it prior to finalization.

**cc:** At a minimum, the letter should be copied to your primary staff and supervisor. At your discretion, you may want to copy others as well to better meet the purposes of this memo.

The memorandum should cover the following three areas:

- **Describe the current partnership and collaborative efforts underway on your unit**

Briefly describe any specific projects or programs that each partnership or collaborative effort is currently engaged in. This memorandum should largely focus on describing key aspects of ongoing partnerships and collaborative relationships that may not have any formal, written agreements that are readily available for your successor to review. Partnerships and collaborative efforts that do have formal agreements (e.g. Resource Advisory Groups, Memorandum’s of Understanding, Cooperative Agreements etc.) can simply be referenced with a description of the activities, projects or goals that are currently underway. Some basic information about the length of time a partner or collaborative effort has been underway may also be useful. Some relationships will be in their infancy while others may have evolved over a period of time.

Where possible, consider having your key partners assist with crafting this section and include their signatures on the memo.

- **Commitments or schedules associated with current partnership and collaborative efforts**

For each of the above relationships, describe any formal or informal commitments you have made to key partners or groups leading or engaged in collaborative efforts with you or your unit. Be sure to include any shared understandings about specific schedules for accomplishing joint projects or implementing shared programs. Commitments may include but are not limited to time agreements, financial arrangements, accomplishments or personnel commitments. These commitments may or may not need to be renegotiated with your departure. However, the current state of any agreement is key information to pass on to your successor, supervisor and staff.

Again, where possible, consider having your key partners jointly craft this section and include their signatures.

- **Current working agreements or procedures**

Describe any local communication norms or procedural agreements that help keep relationships active and well functioning. This may include information about regular meetings, formal and informal expectations or working agreements that partners and the agency have developed during your tenure. This may include but are not limited to information about communication frequency, timing, particular subjects or issues of interest and key contacts etc.

Because this memo will function in concert with other transition activities and an on-site visit with your successor, this memorandum can be reasonably brief and focused on factual information about current partnerships and collaborative efforts that are active and underway during the transition period.

- **Strategy for meeting and getting to know your community**

Describe a potential strategy for incoming staff to foster and maintain relationships within the surrounding community. Include information on potential venues, regularly scheduled events (if there are any), community social gatherings, and contacts for each.

Where possible, engage your key partners in development of this section.

*This memo is intended to focus on establishing and maintaining community relationships associated with ongoing partnerships and collaborative work. It is not intended to be a comprehensive list of activities and/or projects. Partnership and collaborative efforts that have formal agreements in place should be referenced with a brief description of the activity to date.*

