



## **Preparing A Transition Notebook**

Think back to your first few days working on your project or in your position. You probably had many, many questions and no one or nothing to turn to. Take the responsibility NOW to make sure this does not happen to the person who takes your place next year. Prepare a transition notebook.

### **1. Introduction**

- a. table of contents
- b. contact sheet for new leadership/membership
- c. birthday list
- d. blank volunteer agreement contract to be completed

### **2. Letter from advisor**

- a. welcome
- b. role and responsibilities
- c. how to get in touch with him/her

### **3. Historical documents:**

- a. constitution
- b. mission statement
- c. goals and objectives
- d. history of organization and committee/program
- e. job description
- f. organizational chart for organization
- g. officer selection process information (and timeline)
- h. membership recruitment information (and timeline)

### **4. Evaluation**

- a. completed evaluation with detailed recommendations
- b. two blank evaluations (one for each term which can be written during the term)

### **5. Progress Reports**

- a. completed progress reports
- b. blank progress reports (to be completed throughout the year) with guidelines. A progress report provides the "working draft" for most of the transition notebook. It should provide the member with a opportunity to write down what is new or different, what has been improved upon, what is in progress, accomplishments, etc.

## **6. Officer Position**

- a. demographics from current year (number of men/women, classifications, etc.)
- b. letter from former to new coordinator or officer (should include advice, what was experienced, what was improved upon this year, things to know when getting started, prioritizing the tasks for the position and anything else not mentioned; usually written very informally)
- c. blank "Bright Ideas" sheet (to be used throughout the year; ideas that can help move the organization)
- d. current goals
- e. blank goals sheet
- f. detailed timeline
- g. any other information pertinent to position

## **7. Training information**

- a. agendas and handouts from past training retreats or meetings
- b. information on the "how to's" of the organization (such as publicity, financial matters, etc.)

## **8. Organizational information**

- a. calendar of events
- b. meeting agendas and minutes
- c. resources
- d. instructions on how to sign on to your organization's electronic mail message group or conference

A transition notebook can be shared during the meetings with your replacement. It should cover all aspects of your responsibilities and how those tasks fit into the organization's big picture.

Recommend that your replacement file "historical" documents in the notebook such as meetings minutes when he/she has become comfortable with the information. This way, the notebook can be used as a working tool rather than something to be completed at the end of the year (usually during finals!).

Each organization is different so feel free to add and delete topics. Your replacement will thank you throughout the year!