

# Leadersheet

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## 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. 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 Historical documents: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 and bylaws
  - b. mission statement, goals, and objectives
  - c. history of organization and committee/program
  - d. job descriptions
  - e. organizational chart for organization
  - f. membership recruitment and officer selection process 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. These should allow the member to write down what is different, what has been improved, 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 officer; 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

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