Skill Building – Creating a Transition Notebook

Introduction
Think back to your first few days working on your organization or in your position. You probably had many questions and no resources to help. It is now your responsibility to make sure this does not happen to the person who takes your place next year. The easiest way to prevent this from happening is to prepare a transition notebook.

What to Include
Below are suggested sections to include in your transition notebook, but you know your organization, so include everything that may help the subsequent leaders of your organization.

- Introduction, Table of Contents, Contact Sheet for New Leadership/Membership, Birthday List
- Introduction to the Advisor, explaining the roles and responsibilities and how to get in touch with them.
- Historical Documents – constitution, mission statement, goals and objectives, history of organization, job descriptions, election information and timeline, membership recruitment information (and timeline)
- Evaluations and suggestions for the future
- Progress Reports – completed and any in progress
- Information on the "How Tos" of the Organization (such as publicity, financial matters, etc.)
- Organizational Information – calendar of events, meeting agendas and minutes, instructions on listserves or website updates (how-tos)

Final Thoughts
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 club's big picture. Recommend to your replacement that they file "historical" documents in the notebook such as meetings minutes. This way, the notebook can be kept up to date and be used as a working tool rather than something to be completed at the end of the year (usually during finals!).

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