

## EXECUTIVE LEADERSHIP TRANSITIONING GUIDE

### EXECUTIVE POSITION INFORMATION

- Timeline of Tasks or Events:** Give a detailed listing of deadlines or benchmark dates to track progress
- Important Documents or Forms:** An example of a pre-event planning form, camp and enrichment forms, etc.
- Previous Invoices:** Any annual purchases, orders, or fees.
- Contact Information:** Were there any important contacts you made throughout your tenure?
- Successful Ideas:** What actions/strategies/events worked well in the previous year?
- Unsuccessful Ideas:** What actions/strategies/events did not work as well and should be modified or eliminated?
- Unfinished Ideas:** What large ideas were never followed through with during your tenure?
- What Would You Have Done Differently:** Is there anything you would have changed or done differently, in retrospect?
- What Did You Wish You Knew When You Started:** Discuss any of the concepts that were not transitioned to you very well and what you learned from it.

### ORGANIZATIONAL INFORMATION

- History of Organization:** Contextual information on who started the organization and when it began. Any major events or issues that shaped the organization (i.e. large donations, previous committee reviews, disciplinarian action)
- Standard Operation Procedures or Constitution:** Provide either a physical or electronic copy of the document.
- Long Term Goals and/or Strategic Plan:** If previous executive teams constructed a long-term strategic plan, be sure to share this with the incoming executive. Share the current progress up to this point and where the organization is going in the future.

### OFFICE INFORMATION

- Familiarize with the SGA Staff:** Either a formal introduction or an overview of where each staff member is located and what their job entails.
- Where to Go for Equipment:** Tell them how to check out projectors, laptops, walkie-talkies, etc.
- Various Payment Procedures with Ms. Judy:** Overview of Purchase Orders (POs) and how to obtain the various cards (Kroger, Hobby Lobby, ProCard)

### TRANSITIONING IS PART OF YOUR LEGACY TOO!

- Help them set a course for the year and avoid re-inventing the wheel
- Give them resources but allow for room to develop and grow
- Make a clean break and realize that they will do great with your transitioning!