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!