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Leadership Training

Transition Agenda

**Position:**

Outgoing officer:

Incoming officer:

Outgoing officer, please use this document to plan and guide an official transition session with your successor. This document is not a replacement for a transition meeting. Additionally, please consult with your volunteer supervisor to determine if funds are available for in-person transition meetings or if the transition should occur over a phone/video call.

**Handbooks that helped you fulfill your position responsibilities:**

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| Title: | Where to find: |
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**Policies/policy statements this position should be familiar with:**

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**Procedures this position should be familiar with:**

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**Key Dates to Remember**

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| Date(s): | Event(s): |
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**Tips & Strategies**

Use the spaces below to detail tips and strategies that are specific to both your position, and any chapters/groups you manage.

**3 Strategies That Helped You Stay Organized**

List three strategies that you think would help your successor start their role successfully (spreadsheets, Google Drive, binder, etc.).

1.

2.

3.

**3 Communication Strategies**

List three strategies for how to best communicate with the other volunteers/staff/alumnae/collegians with whom your position most frequently collaborates (email/text/conference call, different communication styles, times of the day/week, etc.). This will give your successor context on how to partner with others.

1.

2.

3.

**3 Things You Accomplished**

List three things you accomplished during your term that you’re proud of and you would like to see your successor continue.

1.

2.

3.

**3 Things That Challenged You**

List three things that challenged you during your term, and that you would like to see your successor improve upon.

1.

2.

3.