Tips for Successful Leadership Transition

- **Necessary documents**
  - Transition documents with specifics about the role and any visual guides that may be helpful (ex: screenshots on reserving rooms, ordering needed materials, etc)
    - *Allows the next person in the position to have a clear document about expectations and responsibilities*
  - A document tracking things done throughout the year that includes eval/reflection comments
  - Create a list of people who are connectors/allies etc
    - *Understand your current role and responsibility and use it to build connections. While doing this watch around, listen to what others do and good ideas/opportunities will come*
- **Meetings**
  - Have one-on-one meetings with new people before leaving to go over transition document and what their new role entails
    - *Office hours:* take place in the spring and allow for the old person holding the position and the new person to get to know each other, ask questions of each other, explain confusing things in detail.
    - *Stay in touch with people to answer questions*
  - Talk to a professor/advisor who is involved just to bounce ideas off of each other.
  - Discuss with a supervisor the best way to make sure the next employee/ student worker has the necessary information.
    - *It's important to let people know if you are willing to step up after someone leaves.*
- **Access/Drive Organization**
  - Make sure someone else has access to relevant passwords.
    - *Getting access to needed documents early*
  - Delete docs that nobody will ever use! And name the ones you save in ways that people know what they are!
  - Create a shared Google Drive