

### Lesson 3: Writing a Transition Document

One thing that you can only really do at the end of the year is prepare a transition documents. In fact, some universities and colleges, quite wisely, require it and offer their own templates. A transition document from each executive should include information, reflection, and instruction.

- **Information**
  - **Past Year's Activities:** A summary of what that executive did that year
  - **Usernames and Passwords:** If an executive is responsible for an account (e.g. website, social media, school, email addresses)
  - **Membership List:** Including name, email, phone, social media, preferred method of contact, and other relevant information.
  - **Bank Account and Financial Information**
  - **Where to Find key Documents**
- **Reflection**
  - Some questions you could reflect on:
    - What I wish I knew when I started?
    - What went wrong and why?
    - What went right and why?
- **Instruction**
  - **Calendar of year:** Specify key dates of events, preparation, funding application, elections, AGMs, etc.
  - **How to Guides:** A particularly ambitious executive might include step-by-step guides (or links to articles) for activities that are not covered elsewhere

**PRO TIP:** A transition document is a wonderful way to take stock of everything you've learned this year as a club leader and is worthwhile even for a returning exec to fill out.

#### Sample Transition Documents

- [Oxfam Canada](#)
- [University of British Columbia](#) (scroll down)

#### Sample Handover checklist

- [University of Victoria](#) (scroll down)