

Best Practices

Venturing Transition Document Crews

In filling out and utilizing the Crew Venturing Transition Document Template, there are some areas that can be filled out in the moment by the outgoing officers, some that require input throughout the year and some that benefit from collaboration between the outgoing and incoming officers. Regardless of the detail put into these documents, outgoing and incoming officers should still be having conversations to discuss the transition. It is important to note that while these documents provide a helpful outline of information that should be shared between the outgoing and incoming officers, every Crew looks a little different, so feel free to add to this document what you think will be most beneficial for your teams.

The following items should be added throughout the year, by the outgoing officer, as they present themselves. Working on these areas throughout your term makes it so that you don't have to dig through information at the end in the middle of the transition process:

- Awards and Recognitions Records as they are presented.
- Post Description and Link in the Communications Records.
- Description and attendance in the Program Records.
- Suggested Timelines.
- Examples and results of Identifying and Incorporating Diverse Talent.
- Notes on General Tips and Advice.
- Description of Initial Goals for Term at the beginning of the term.

The following items should be added at the end of the term, by the outgoing officer, to ensure the most accurate and up to date information:

- Contact Information of the outgoing officer in the case of further questions.
- Intra-Team/ Inter-Team Relationships.
- Description of the General Time Commitment of the position.
- Reflection of Initial Goals and advice.



Best Practices

The following items should be added by the outgoing and incoming officers during a conversation between the outgoing and incoming officers to ensure the discussion of prior results and how to improve within the next year:

- Plan for the Continuation of Projects including advancement efforts such as service hours, training, or outings.
- Communications calendar based on Communications Records.
- Outline advancement process with Awards and Recognitions Records.
- Discussion on future program with Program Records.
- Setting Key Dates for the upcoming year with prior dates in mind.
- Discuss the Term Takeaways and General Tips and Advice.
- Discuss and add Resources as needed.

