Society Executive Transition Report Guide

Thinking about writing your transition report? Start here.
Introduction

Transition reports are one of the most important and useful tools an executive member can receive at the beginning of their term. Writing a transition report can appear daunting but it doesn’t have to be! This guide will hopefully help you write a good transition report for your successor.

Executive reports are a guide, passed from predecessor to successor, that gives people the knowledge and advice they need to be good executives. Transition reports include information about anything from regular tasks to issues someone faced while in office and how they attempted to solve them.

When not properly transitioned, an executive can have a hard time navigating their time in office, make unnecessary mistakes, miss opportunities, and not be fully able to utilize their capabilities. They will also be unable to pass on this information to their successor. This is what is called a loss of institutional knowledge.
Step 1: Preparing to write your transition report

Gather notes and materials that you used in the previous year while doing your job as a society executive. This can include quotes from an event you held last year, notes from an executive meeting.

Gather things like your society’s constitution or a report that you may have received from your predecessor.

Set some time aside to write your report during a period when you don’t have as much stress or deadlines to meet towards the end of the year, i.e., before exam season. That is the best way to ensure that the report will be done in time without getting a burnout in the meantime.
Step 2: Outline your report

Sections you may want to include in your report are:

The history and purpose of your society.
- This will help the reader understand what the underlying principle of their goals should be.

The scope and portfolio of your role.
- This will help the reader understand what is within their jurisdiction, ensure they meet their responsibilities, and build a basis for their goals.

What a year in office looks like.
- What are the events your society usually runs? What is your responsibility at those events?
- How often do you hold meetings? What do you usually have to offer in those meetings?
- Information on elections and other procedurals.

The scope and portfolio of the other executive team members.
- This will help the reader understand how their role interacts with and compliments the rest of the team.

Supporting documents.
- Your society’s constitution, if you have one.
- Relevant passwords (e.g., email, social media).
- Relevant banking and money information.
Step 3: Fill in the blanks

Add details to your outline! Make sure to make your report a little personal, so that people understand what the desired outcomes of your term were, and what the results were. Some things to consider are:

- What issues and obstacles did you encounter over your term? Is this a problem the reader is going to be facing as well? What did you do, and what ideas do you have for the future?
- What things went well, which ideas worked, and which practices would you recommend are carried on?
- What things do you wish you could have done (new ideas and old traditions) but didn’t have the capacity to do? What recommendations would you give?
Step 4: The transition process

Once your successor is elected or appointed, send them their report so they can go over it. Send it to the Society’s President as well, for record-keeping purposes. That way, it is less easy for institutional knowledge to be lost over time.

Ideally, you want to establish a channel of communication between you and your successor in case they have any questions or need additional help during the beginning of their term. If that’s not possible, at least make sure they have received their report before you move on to new things!