

Transitioning to a New Organizer or Team

The best way to transition to a new leader, or team, is to have them shadow the current leader/team for 1-3 months before taking over. This will help the new individual or team feel comfortable with the group before taking the reigns, and will also help cover all the small details that may get looked over during a transitional meeting.

Exchange All Documents

1. Provide new organizer/team with electronic copies of all internal documents, such as vision & measures, budgets, RR&E's, email lists, etc.
2. Provide new organizer/team with electronic copies of all flyers/promotional materials made

Offer Advice/Necessary Information

3. Give new organizer/team detailed information about when and where meetings take place, how reservations are made (and with whom), and any important details about the location (i.e. switches from inside to outside depending on the season, busy for basketball games, etc.)
4. Provide information on current donors (if applicable), membership policy, contacts with local free market leaders, representatives, and groups (offer introductions if necessary), etc.
5. Inform new organizer/team of the SMS service and how to use it; include the number of contacts already in the system

Provide Information on Past Events

6. Offer the new organizer/team information about the past history of the group – such as a list of past speakers/guests, activities, events, etc. This could be in the form of an Excel sheet or Word document

Hand Over All Electronic Control

7. Make new organizer/team an admin of your website, FB page, FB group, Twitter account, MailChimp email account, and/or any other site you advertise your group through.

Announce the New Leader/Team to Members and Attendees

8. Before stepping down it is important for the current leader or team to announce the transition and introduce the new leader/team if possible. This will not only help the new

organizer adjust, but will ensure there is not an abrupt transition that threatens the welcoming atmosphere for attendees and members