



What to Include in a Staff Transition Binder

Key Items and knowledge that will help future staff succeed

(This is not an exhaustive list):

- Financials
- Recent List of Donors
- Important Contacts
- Board
- Volunteers
- City Council
- City Department Heads
- Other Stakeholders
- Repairmen for HVAC, copier, etc
- Other Vendors
- Coordinating Office
- Monthly Reporting Form
- Cumulative Reinvestment Statistics
- Any current contracts with vendors
- Calendar of Meetings
- Calendar of Upcoming Events
- Account Numbers for anything and everything
- Procedures for retrieving mail, paying bills, submitting time cards etc.
- Work Plan/Action Plan (organizational summary, Board, ED, committees)
- Vision/Mission Statements
- All organization public relations and marketing materials
- Letterhead and vendor contact information
- Most Recent Board Minutes, Agenda, and ED Report
- And anything else you feel is important to help your new ED jump right into the job!