



HOW TO WRITE A TRANSITION MEMO: A PRACTICAL GUIDE

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So, you're moving on. Or, even scarier, one of your key staff members is moving on.



There are plenty of reasons to leave your position—retirement, a move, a new challenge— but, for some reason, change is often difficult to comprehend, plan for, and manage. One tool that can help ease the transition for both the departing employee and the organization is a transition

memo. If written properly, a transition memo can serve as a reference manual and a multi-function tool—like a Swiss Army knife, each section of your memo will serve a different purpose.

First Things First—Should I Really Write One?

Yes! Taking the time to write a transition memo will leave you with the peace of mind that you did your part to continue your legacy with minimal interruption, and it will signal to your successor and organization that you want to ensure their success after you leave.

Your transition memo will give you a framework to pass on important aspects of the work that you do, and will give your successor an historical perspective on what you have accomplished during your tenure. You can use it to communicate your thoughts on the position, and on the organization as a whole.

The following sections include some overarching themes to consider when writing your transition memo, which will serve as a reference manual, safety net, and warm welcome.

Historical Context

Unless you are a founding member, you don't really need to communicate your organization's basic history—that information is probably on your website! But, you should think about whether there are any departmental or organizational strategies that may

need some backstory. Some examples that come to mind: Why was a position recently created? Why did your organization reorganize into litigation groups based on subject matter? What larger themes have you encountered during your tenure in areas such as funding, staffing, or litigation? Providing an historical context can help new employees quickly understand organizational dynamics.

Advocacy Initiatives

Everyone has dockets and work plans and day-to-day meetings, which will continue long after you are gone—but it might be helpful to leave behind a big-picture overview of your organization's strategic vision for its advocacy. Departmental leaders can certainly provide day-to-day information about litigation, public policy, and communications, but a big-picture look from your perspective about where your organization is, and where it is headed, will be a useful exercise. Think long-term. Where has your organization, historically, been a trailblazer? Where do you wish your organization could do more? Where are you winning and losing?

Administrative Minutiae

Most of us hate some aspects of our work. Often, those aspects are administrative in nature. Whether you like them or hate them, you will still want to provide an overview of the administrative work that has been expected of you—willingly or not. Be clear about the amount of time you spend on administrative tasks and what the tasks entail. Board activities, pro bono outreach, professional development, and personnel management might not be your core responsibilities, but they are still important, and they must continue after you leave.

You want to provide broad strokes, but tiny details are helpful as well. A lot of the information that you will want to leave behind is practical. Where do you hide the keys to your filing cabinet? Is your name on

any organizational accounts or vendors? Do you need make any introductions to ensure the continuity of organizational relationships? Finally—and this is a big one, so spend some time on it—is there anything that only you know how to do? Hopefully, the answer is no. If it is yes, it is always preferable to cross-train before you leave rather than field a frantic phone call six months later. Figuring out logistics takes time that your successor could devote to mission-focused activities, so the more you can do to help your organization figure things out, the better off everyone will be.

Strategic Planning

What did you always want to accomplish, but never found the time? Ideally, where do you see your position headed? If you want to get fancy, consider doing a small SWOT analysis to explore and communicate your thoughts about your position and how you envision the future. Of course, your successor may have other plans, but your thoughts will be an invaluable initial resource. No one is in a better position than you to advise your successor on how best to move the organization forward.

Calendaring and Timelines

One exercise that is tedious, but also incredibly helpful, is to set aside time to look back through your calendar for the past year. Are there certain events that happen at the same time each year? Is there a repetitive nature to the flow of your year? What crept up on you or required a lot of your time? Reviewing your calendar will remind you of helpful information that you will want to share, and it will help provide some structure.

Final Thoughts

The most common onboarding road blocks generally fall into two categories:

How do I do this? How do I accomplish this task, which must be performed on the third Monday in March, but nobody remembered to tell me about because I was hired in August? If only my predecessor had left me instructions explaining what they had to figure out twenty-two years ago, I could have saved myself hours.

Why do we do this? Think of these as the Just So Stories of your organization. The answers to these questions provide important context. Sometimes, the way things are currently done does not make sense to a new employee, until they hear the backstory. The real reason your office has monthly meetings about the coffee machine might be a worthy story to retell.

It is difficult to anticipate everything you might want to tell your successor as you plan your departure, so your transition memo is the perfect place to establish boundaries for future communications. If you are happy to meet for coffee or field phone calls for the first few months, include that in the memo. Be clear on your availability, and know that offering your help will provide reassurance that your legacy will continue long after you have left.

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☉ ESSENTIAL STAFF MAY SOON RETIRE
Continued from page 11

feedback. It should pay regular attention to the organization's mission, vision and values, especially during transitions. It can ensure investment in leadership development. And, of course, it has the responsibility to lead a search and choose an executive director when that is the position with the vacancy.

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