

By Re_Generation

Team Transition

Description

Having a strong transition for both executives and general members is essential in order to ensure continuity of your organization and projects. It is important to plan ahead and have everything you need before onboarding into new positions. This guide contains information on when to start, what types of information to cover and how to go about the successions. There is also a brief overview of common challenges and how to mitigate them.

Acknowledgements

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About Re_Generation

[Re_Generation](#) is a Canadian youth movement that seeks to build a regenerative, sustainable, and just economy. We aim to reimagine our schools, repurpose our careers, and remodel our companies to be aligned with regenerative principles. In particular, we provide resources for individuals to launch impact-driven careers and advocate for change within their companies and schools. We also aim to advance public policies that promote regenerative and sustainable business practices.

Our successful 'Our Future, Our Business' Manifesto campaign received the support of 65 youth organizations, 130 high-level executives, and 100 civil society organizations recognizing the need for reform in business education on sustainability. After three years of existence as the Canadian Business Youth Council for Sustainable Development, we have changed our name to Re_Generation to become more inclusive of all youth, not just business youth.

We believe that the ideal society is a [regenerative](#) one. Regeneration to us means putting human and ecological [well-being](#) at the centre of every decision. It means restoring relationships, both within nature and within society, while helping all communities to thrive. Read more about our history and vision at our [About Us](#) page.

Importance of Great Team Transitions

Being prepared for the succession of your teams is extremely important, especially for executives, and must be planned well in advance. A strong or weak change in executives/members can make or break an organization! Ensuring that you are set up to smoothly transition your teams is crucial to thriving as an organization and allowing your mission to continue!

Planning for Transitioning

Ensure that you have a detailed plan in place at least 2 weeks ahead of each planned transition period, which usually lasts between 2 to 3 weeks. Preferably your incoming President(s)/leadership team are prepared and have the new team training ready before recruitment starts since this time is very busy. Starting the transition while everybody is still in school can allow you to organize team bondings while everybody is still in town and organize meetings between the former and new teams. Having the transition before the summer starts also allows you to use the summer to get started on projects, which usually makes things less overwhelming when the next school year starts and also allows you to plan for many more initiatives.

Some basic areas of training that you will need to address include:

- Overview of the organization and portfolios
- Understanding the branding of the organization and knowing how to properly represent what you do and stand for
- The plans for their specific roles
- How to use the tools required
- Team schedule & communication methods
- Expectation setting as a team (what does everyone expect from each other?)

Don't forget to get to know each other on a personal level and have some fun too!

Some additional transitioning topics to consider for executives are:

- Detailed descriptions of past initiatives and lessons learned
- Tips for team, time and project management
- The culture of your organization
- Access to all important documents or tools that may not be accessible to all members
- Financial considerations
- Formal procedures of the executive team
- Feedback on plans for the coming year

For executive teams, you can also consider planning a transition day or weekend retreat where you spend time getting to know each other, cover all of the important topics in depth, and start to plan what you want to do as a team in the coming year. This can be a great bonding, learning and planning experience and be very fun to start the year off right!

Who is responsible for the transition?

- For executives: the predecessor should be fully transitioning their successor 1-on-1, with the support of the president/co-presidents
- For new members: their team leader should be responsible for training all of their members together or on a 1-on-1 basis if someone can't make it

- You may also be able to do some larger trainings as an entire organization as well, with the executive team leading

For more information about recruitment, read our [Recruitment Guide](#).

Common Challenges and Mitigations

Keep in mind that transitions don't always go smoothly for various reasons, such as someone needing to suddenly leave their position before a successor has been trained, so it is important to have back up support in place.

Having an organized database that has everything to do with your organization in place, such as a google drive, makes transitions much easier. Think about the question: If someone were to suddenly leave the organization, would I have everything I need to take over that position? Having an accessible overview of your organization and portfolios, the past projects worked on including successes and areas of improvement, the tools used, etc. is crucial for ensuring continuity.

Turnover rates can sometimes be high in student organizations, whether due to time constraints, lack of fit, etc., resulting in sudden changes. You should expect that not 100% of recruits will stay in a large student organization, and make a plan for what you will do if you lose any members. You may want to recruit someone new that you know will be a good fit from your existing networks, or wait until the next round of recruitment and shift tasks among your team if it doesn't impact your outcomes too much.

Maintaining a strong culture that team members enjoy is also important for ensuring that your transition and projects run smoothly. Your team members will be more likely to succeed and stay if they feel valued and have fun doing their work!

Resources

- [Passing the Torch](#) guide by Relmagine17