

## Leadership Transition

*“How do I reserve a room in Hughes-Trigg?” “What is the copy code?” “Where is the updated constitution?”*

These are common questions from new leaders of organizations that have had neither an effective nor sufficient leadership transition. Making the transition from old to new leadership is the responsibility of both the outgoing and incoming officers. The passage of knowledge, experience, accomplishments and goals for the organization will help current officers gain a sense of completion and bring closure to their terms. At the same time, the transition gives the new officers valuable information, advice, and confidence for the future.

Leadership transition should be customized to fit your organization. There are some key aspects of a successful transition: first, it is a good idea to have the first meeting with the new leadership be a joint meeting with the outgoing leadership. This allows the members – incoming and outgoing – to interact and share information about the organization or committee, plus gain insight from predecessors. This is also a good time to share contact information to help facilitate a smooth transition.

It is often helpful to break up the leadership transition process so as to not overwhelm the incoming leadership. Consider organizing multiple meetings covering the topics below.

### Topics for Leadership Transition

- Review purpose/objectives of the position or committee.
- Review past programs and services.
- Evaluate the position and the committee or organization including its responsibilities and expectations.
- Share problems, helpful ideas, and recommendations.
- Show new leaders reading materials and appropriate files to review before the next meeting:
  - ❖ Job descriptions and responsibilities
  - ❖ Status reports on continuing projects
  - ❖ Evaluations of past projects
  - ❖ Meeting minutes and agendas
  - ❖ Calendars and yearly plans
  - ❖ Member list
  - ❖ Resource and contact list (vendors, helpful staff members, etc)
  - ❖ Financial records
  - ❖ Historical records (old contracts and invoices, surveys, etc)
  - ❖ Constitution and bylaws
  - ❖ Passwords! Facebook, copy codes, email login info, office door code, Twitter, Dropbox, Google Docs, etc.
- Review the files given to new members at the last meeting. Point out what resources are especially helpful, what files or documents are needed for which programs, etc.
- Remember that this meeting should be for information sharing, and not a “how-to” meeting. The incoming leaders should be allowed to make decisions and carry out their positions on their own.
- Introduce the incoming leaders to important contacts: advisor, staff members, alumni, community members

### Document exchange

To ensure a smooth transition from one executive board to another, officers should store documents and materials that would be useful for the next group of leaders in a way that is easily accessible – in binders, via cloud storage like Dropbox or Google Docs, or on a flash drive. When doing this, don’t hesitate to include all the little details! What seems like common knowledge now may well be forgotten in two to three years. Your successors will thank you for not having to spend their entire term determining something that could have been explained to them in a few sentences. In addition to the concrete information that exists for each position, it is a good idea to include a list of recommendations and ideas for the new leader to think about. Much of their first few weeks will be dealing with absorbing all the

information, but duties and problems don't wait until you've properly learned the position. Having your input will give them a place to start.

### **Look for Leaders**

Who knows the person that will best fit your shoes? You do. Start looking for emerging leaders early. When you notice them, give them encouragement. Get them thinking about taking up a leadership role. One word of encouragement can go a long way, so don't neglect the opportunity to inspire your organization's future.

### **Training Sessions**

Everyone gets busy at the end of the semester. Even if your officer transition isn't at that time period, it's important to schedule training sessions. It's great to hand the new leaders a binder and tell them to read it, but interacting with the person who last held the position is much more beneficial. The binder is a good reference, but what you see is what you get. Only the person who has experience can answer the questions that will undoubtedly be asked. Be proactive and schedule a couple hours with your successor before the officer transition period.

### **Establish Relationships**

Every leadership role is not all-inclusive. You must work with other people to get your job done. Before transitioning from your office, make sure to introduce your successor to the people you worked closely with. This will save them from figuring out whom they need to know and then meeting them. It would be advantageous to establish these relationships as you train your successor of his/her duties. Make sure to include the contact information for these important people in the informational binder.

### **Bringing It All Together**

The most important relationships you will have will be between your other executive board members and your advisor. All of the officer positions are designed to mesh and complement each other. As an outgoing executive board, it is important that you set up a meeting between the new officers and the advisor, and explain how the positions all fit together into a concentrated effort. At this meeting it would also be good to establish some expectations of the organization that year, and how they are to be accomplished. Now that you have given the new leadership of your organization the tools and guidance to lead, you may feel confident about the future of your organization.

*Adapted from Michigan Tech Office of Student Life*