Developing a Leadership Transition Plan

How to transition effectively

- Start EARLY!
- Identify potential leaders in your organization early in the year
- Encourage potential leaders through personal contact
- Delegate responsibility to them so they can develop skills
- Model effective leadership styles

Transition Toolbox

- Organizational structure
  - Develop a mentoring program
  - Develop leadership notebooks for each position that can be passed down
  - Election of officers one month before installation to provide an overlap period for new and old officers to work together
  - Create a shadowing program
- Preparation by outgoing officers
  - Review and make current the constitution and by-laws to reflect changes made during your administration
  - Review job descriptions to make sure they are accurate
  - Ask yourself what you wish someone had told you a year ago
  - Make your membership files and mailing lists current
  - Write reports about traditions, ideas, continuing projects, or projects that were never implemented
  - Pass down student organization’s thumb drive to new e-board with updated documents
- Outgoing and incoming officers together
  - Create a transition retreat for the outgoing and incoming boards
o Arrange for each position to meet and review files, leadership binders, job description, etc.
o Introduce incoming officers to advisors, student leaders, SLE staff and other administrators
o Share effective leadership skills you learned on the job
o Acquaint new officers with physical environment, paperwork, forms, supplies and equipment

• Share knowledge
  o Mission/Vision statement: who are we? What do we stand for?
o Constitution and by-laws
o Job descriptions and role clarifications
o Organizational goals and objectives
o Status reports on ongoing projects
o Evaluation of previous projects and programs
o Previous minutes and reports

• Evaluate the transition
  o Identify leaning outcomes and program goals
  o Identify performance measures
    ▪ How will you know the transition plan worked?

• Recognition and induction ceremony
  o Institutionalize recognition of outgoing and incoming officers
  o Provide ritual for members of organization
  o Allow new board to take ownership of some aspect of event so that they begin learning how to work together

Leadership Notebook

1. History of organization and organizational chart
2. Constitution and By-laws
3. Job descriptions of each position
4. Reports on past and continuing projects
5. List of goals – accomplished and unaccomplished
6. “Rearview Mirror” or “What I Wish I Had Known” Sheet
7. Monthly project reports and End of the Year reports
8. Copy of the budget
9. Calendars of previous events
10. Rosters and frequently used numbers/emails
11. List of rules and regulations, USF policies that are pertinent
12. Leadership resources and handouts (like this one!)
13. Achievements and areas for improvement
Rearview Mirror: Reflecting on Your Leadership Experience

Answering the following questions honestly will help new leaders learn from your experiences.

What was your best experience in this position?

What tips would you give your successor to make things smoother?

Name the administrator/staff people that you found to be the most helpful.

What did you find most difficult about this position?

How did you utilize your advisor? How do you recommend approaching him/her?

What was the best resource (notebook, office, administrator, etc.)?

Which offices/organizations did you collaborate with successfully?

Which offices/organizations did you collaborate with that were unsuccessful? How do you recommend improving this relationship?

Please list group you wish you had worked with, worked with better, or worked with more. Why?

Please list and describe projects you are working on that you would like to see continue.

Please list and describe projects you are working on that you would like to see started.

What is the most important lesson you’ve learned in this position?

What do you wish you had known a year ago?

For more tips and resources, please contact the Peer Advising Team (PAT) in Student Leadership and Engagement, UC 4th Floor

Visit us at www.usfca.edu/sle and click on the Peer Advising Team tab!