

Leadership Transitions

An intentional process for a seamless transfer of organization responsibilities that builds emerging leaders, prepares incoming leaders, recognizes the work of outgoing leaders, which positions the organization for long-term success

Good transitions involve both **logistical tasks** and **relationship building**. When done well, this process is ongoing. Do not make your successors start from nothing – let them build on your work so that your organization will not only survive but THRIVE.

Talk to each other

- Make sure that you are meeting with your successors – multiple times if possible
- Connect incoming and outgoing exec board members
- Group conversations and group goal setting sessions are great!
- Engage your advisor in these conversations if possible

Have a plan for transitions at the beginning of your term

- Transitions should be a part of your calendar from the beginning
- Plan for shadowing time
- Are you in the right registration window for your transition timeline?

Records matter

- Be thorough with your transition records
- Keep them digital so people can build year to year (does anyone really read that binder?)
- Write them as you go – do your future-self a favor
- Follow the transition document check list

Initiate relationships for your successor

- Connect your successor to key people they may need to know (i.e., advisor, university staff, orgs you collaborate with frequently)
- Start a conversation they may not know they need to begin

Visit the bank (and other logistics)

- Go to the bank and transition the account
- Prepare for org registration process
- Prepare them to budget/calendar plan for the year
- Follow the transition check list

Ensure your organizations lasts beyond you

- *This is the goal of leadership transitions*

Leadership Transitions

Good officer transitions are important to the continued operation and success of student organizations. It helps minimize confusion, gives outgoing officers a sense of closure, and provides incoming officers a foundation of knowledge. You should think of your transitions as a **partnership** between the incoming and outgoing officers.

Outgoing Officer Preparation:

Preparing to transition out of a position and bring a new member into your role is a culminating moment for your Executive Board membership. As an Executive Officer, we know you want to leave a legacy for your student organization, and your legacy will continue with how well you transition this new member into the role you are vacating. Consider the following items as you prepare for the transition.

Preparation checklist (items needed to pass on)

- ✓ Up to date copy of organization's Constitution and Bylaws
- ✓ Up to date position description for each role
- ✓ Keep ongoing records of happenings and changes during the year
 - Ex. Awards won, Meeting Minutes, Organization Calendar, etc....
- ✓ Update documents to include any changes from the year
- ✓ Ex. Important Contact List, Mission, Organization financial information (including bank account access and EIN - Employer Identification Number - ownership)
- ✓ Collect all physical artifacts to pass down to the incoming officers
 - Ex. tri-fold boards, organization Plaques, leftover supplies, etc....
- ✓ Collect all the usernames and passwords for relevant accounts
- ✓ Review yearly calendar and planning timelines, adding notable events with descriptive feedback
- ✓ Information about relevant Ohio State resources (Student Org Success Framework, Student Org Success Coaches, Programming and Operating Funds requests, meeting space reservations, etc.)
- ✓ Plan for an opportunity for incoming leaders to shadow outgoing leaders
- ✓ Plan a time for a meeting with the incoming officer
- ✓ Complete Outgoing Officer Reflection/Role Debrief:
 - During the year, I enjoyed this about my position the best...
 - The events we host are successful because...
 - The events we host can improve by...
 - The most important task I performed in my role was...
 - The person who helped me the most was...
- ✓ Write a reflection letter on the past year for the incoming officer
- ✓ Other items as applicable

Leadership Transitions

Incoming Officer Preparation:

This incoming officer should prepare the following in preparation for their meeting with the outgoing officer.

- ✓ Review the position description
- ✓ Create a list of questions to ask during your meeting – really use this time to learn from your outgoing officer
- ✓ Create a list of things you want to do with this position and some ideas about how to get them done
- ✓ List out some of the potential resources you know of that will help you with this position
- ✓ Think about who else on the Executive Board will be an asset to your success in this position
- ✓ Contact the Advisor to introduce yourself and ask any relevant questions
- ✓ Plan a time for a meeting with the outgoing officer
- ✓ Complete the Incoming Officer Reflection:
 - My goals for this position are...
 - I think I'll be best at this part of this position...
 - I might struggle with this aspect of this position...
 - My biggest strength I'm bringing to this position is...
 - I hope I grow in this way...
 - I am so excited to work on this project...
 - The part of my life that most prepared me for this position is...
 - This position might help me get to this place in my professional life...
 - Is there something I should be asking...

Leadership Transitions

Transition Meeting(s):

These meetings are dedicated to ensuring the transfer of information and advice from one officer to the next. Multiple meetings may be necessary. It can also be helpful to have a meeting with the outgoing and incoming executive boards.

- ✓ Go over job description in detail
 - Is anything missing from this job description?
 - What was your main priority during the year?
- ✓ Ongoing projects
 - Give context - where you are in this process, what still needs to be completed and what is in the works right now?
- ✓ Share contact information of important people
 - Advisor
 - Other officers
 - Stakeholders
 - University employees who help the most
- ✓ Develop Communication method between the officers
 - How will they reach you if they have an urgent question?
 - Who should they look to if they are confused?
- ✓ Review important systems
- ✓ Review financial standing of organization
 - Update information with bank account and share with incoming officers
- ✓ Update access for any website, email, listserv, etc.
- ✓ Share access to Buckeye Box, One Drive, Google Drive, etc. that your organization uses
- ✓ Update roster in Student Organization Management System
- ✓ Convey goals, suggestions, personal reflections
- ✓ Share advice with successor
- ✓ Answer questions
- ✓ Other items as applicable

Leadership Transitions

Completing the Transition:

For the outgoing officer:

- Once you have held a few meetings between the incoming and outgoing officers, you will need to rely on your communication plan
- If you have a shadowing period in place between incoming and outgoing, have a deadline for when that will end and be clear about that
- Once the deadline is upon you, you will enact your communication plan
- You will have handed off all the passwords, shared access to everything, etc....make sure that they have all the information they need to be successful
- Trust that you have done an excellent job and that they will be successful!

For the incoming officer:

- Complete/update transition records
- Schedule meeting(s) with organization advisor
- Complete Registration Requirements in your window
- Update Alumni Roster
- Plan the budget and calendar for the upcoming year (this could best be done with the combined incoming and outgoing executive board)