How can I ensure a successful transition?

In addition to providing your successor with valuable historical information, here are some other things you should think about at the end of the year. How do you leave your position gracefully? How do you ensure that the new leader is ready to continue to provide your organization with strong leadership? A thorough leadership transition plan has several benefits:

- Provides for transfer of significant organizational knowledge.
- Minimizes the confusion of leadership changeover.
- Gives the outgoing leader a sense of closure.
- Uses the valuable contributions of experienced leaders, usually the most neglected members in your group.
- Helps incoming leadership absorb the special expertise of the outgoing leadership.
- Increases the knowledge and confidence of the new leadership.
- Minimizes the loss of momentum and accomplishments for the group.

Tips

- When the new leader has been chosen or volunteers, get together with him or her to talk about the transition. This process provides the new leader with an opportunity to understand his or her role with some history from the year before.
- Be sure to transfer the knowledge and information necessary for the leader to function well. This is where the binder comes in handy! Take time to organize any files or notebooks so he or she may quickly access information.
- If you have a student organization space, acquaint the new leader with the office, supplies, equipment, and any office procedures.

This brochure is part of a series that is an integral component of our endeavor to fulfill our mission. We hope that these are helpful to you. If you have suggestions for additional subjects please let us know.

“Success is a journey, not a destination. The doing is often more important than the outcome.” - Arthur Ashe

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Colgate University
Guide to Organizational Transition

It can be very difficult for student groups to maintain significant levels of “institutional memory” when leadership positions change each semester/year. When a student leader who is exceptionally passionate about the organization is on leave or graduates and does not leave a successor who has the time and energy to maintain the group it can be detrimental to the productivity and effectiveness of the group. This brochure will give you some helpful tips on how to pass on information successfully and how to facilitate a transition before you leave.

How can I keep consistency in my organization from year to year?

It is often a good idea to create a working binder that you can use for your organization’s information throughout the year and that you can pass on to your successor. Think back to the beginning of the semester when you first began in your leadership position. You probably had many questions and nowhere to turn. Take the responsibility now to make sure this doesn’t happen to the person who takes your place. If you work on it throughout the year, it won’t be difficult to pull together during the final weeks of the semester. A transition notebook should cover all aspects of your responsibilities and how those tasks fit into the organization’s purpose. It should be shared in a meeting with you and your successor.

The following suggestions may not be applicable to all Colgate organizations, so pick and choose the elements that seem most logical for your group.

Introduction

- Contact sheet for new leadership or membership
- Contact list of your advisors (CLSI and otherwise)
- Contact list of outside people or organizations with which your group has been affiliated

Organizational information

- Calendar of events and activities your group does during the year
- Meeting agendas and minutes
- Resources
- Information on the “how tos” of the organization (such as recruitment, publicity, and financial matters)
- Copies of previous years’ BAC requests and expenditures
- Inventory of group supplies and possessions

Progress Reports

- You may want to write a semester-end progress report so the new leader knows what projects the group had been working on and where you were in the planning process. This could include advice, what was experienced, what was improved upon this year, things to know when getting started next year, prioritizing the tasks leadership positions, and anything else that happened over the year.
- Other sections can include traditions, ideas, or incomplete projects.

Historical Documents

- Organization constitution
- Organization bylaws
- Goals and objectives
- History of organization and committee or program
- Position descriptions
- Membership recruitment information [and timeline]

President or Group Leader

- Letter from former president to current president
- Blank “ideas” sheet (to be used throughout the year; ideas that can help move the organization forward)
- Current goals
- Detailed timelines for programs and events
- Any other information pertinent to the position

How can I make sure there will be another student leader to take my place?

- Start the transition process early in the year to prevent problems at the end of the year.
- Make sure your organization is open and welcoming to new members. It’s hard to cultivate new leaders if you don’t have new members!
- Begin early in the year to identify emerging leaders. Are there other returning students who could take a lead? Are there first-year students who may be good leaders in a year or two?
- Give emerging leaders a sense of ownership and investment by encouraging them to take on responsibility and implement their own ideas.
- Encourage these potential leaders through personal contact. Help them to develop skills by delegating responsibility to them, sharing with them the personal benefits of leadership, clarifying job responsibilities, and last, modeling an open, encouraging leadership style.
- Introduce potential leaders to staff members, contacts, and other people who were useful to you and whom they should get to know.

Some of the information in this brochure was obtained from the University of Michigan’s student activities and leadership office.