A Blueprint for Leadership Transition

Why Transition? What are the Benefits?

There are several benefits for creating a blueprint for the incoming members of your organization. In order to do this effectively, leaders must begin the transition process early!! Begin early in the year to identify emerging leaders in your organization and encourage these potential leaders to become more involved with the organization. You can also begin the transition process by staying organized and creating a filing system for organizational documents.

Benefits of a Planned Leadership Transition

- Provides for a transfer of significant organizational knowledge so your group will not have to re-invent the wheel each year.

- Minimizes the confusion that occurs with the “changing of the guard.” While new officers try to figure out what is going on, precious time can be lost to the organization. This time lag affects the whole membership, who may not understand what all the confusion is about. It definitely lessens the group’s ability to accomplish their tasks or goals.

- Gives the outgoing leaders a sense of having completed their jobs or a sense of closure. It can help them let go—often a difficult thing for committed leaders to do.

- Provides an opportunity to evaluate the organization’s progress over the year

- Ensures that the valuable contributions of the experienced leaders will be utilized. They are often the most neglected members in your group.

- Serves as an orientation for incoming officers and results in the new leadership having more knowledge, and consequently, greater confidence in their abilities.
Transitioning Your Organization (Continued)

What can the outgoing leadership do to help with the transition?

A transition report or transition notebook should essentially provide the incoming leadership with the resources and knowledge of the organization. It serves as a way to document what has already been accomplished and also serves as a blueprint for recreating organization events, programs, and traditions. Although a bulk of the transition report will include written materials, outgoing leadership should take time to:

- Share traditions, ideas or completed projects, continuing projects and concerns, or ideas never carried out
- Organize the group's files
- Acquaint new officers with the physical environment, supplies, equipment, etc.
- Introduce new officers to important campus personnel and your advisors

Suggested Items to Include in Your Organization’s Transition Notebook

1. Table of Contents
2. General Organization Information
   a. Constitution & By-Laws
   b. Mission Statement
   c. Organization Goals & Objectives
   d. History of Organization
3. Officer and Member Information
   a. Contact Sheet of Executive Board, General Members, and Advisor(s)
   b. Executive Board Job Descriptions and Responsibilities
   c. Committee roster, if applicable
   d. Officer Selection Process Information and Timeline
   e. Training Information (Handouts from Retreats, Workshops, etc.)
4. Meeting Agendas & Minutes
5. Yearly Organizational Calendar
6. Membership Recruitment Information and Timeline
7. Information on Programs/Events
   a. Traditions
   b. Planning Process & Timeline
   c. Event Budget
   d. Copies of Advertisements, Event Planning Forms (EPFs)
   e. Photos from the Event
   f. Evaluation/Suggestions for Future Events
8. Copies of Newspaper Articles, etc. about the organization
9. Financial Records, Budgets (past years and current), & Fundraising Ideas
10. Correspondence
    a. Monthly mailings and e-mails
    b. Pertinent Listserv messages
    c. E-mails to the chapter/organization - pertinent to the positions
    d. E-mails from the advisor with important information
11. Organization's Successes and Challenges
12. Miscellaneous Information

...And any other information that would be helpful for the incoming members to know!

Remember, this is the blueprint for your organization!!!