Leadership Transition

Transitioning the leadership of a student organization is a necessary task, but can also be a difficult one. Many times information can be lost and lessons learned cannot be passed on. Use these checklists to make your organization's transition as smooth as possible!

Incoming Officers

- ❑ Meet with your advisor(s) if applicable.
- ❑ Make sure you have access (including passwords) to the following (as applicable): bank accounts, social media accounts, organizational mailbox, organizational email.
- ❑ Update organizational information with the Office of Student Leadership Development.
- ❑ Meet with your predecessor and not only learn about what they did, but ask them for ideas or suggestions of what worked and what didn't work, what they wish they could do over, etc.
- ❑ Collect important documents and resources from your predecessor, such as reports, manuals, binders, old budgets, etc. and review the documents. If you have questions about these, ask your predecessor as soon as possible.
- ❑ With the other incoming leaders of the organization, talk about the current state of the organization. Ask questions like "How are we doing in areas that matter to us?" or "How are perceived by stakeholders/partners outside of our organization?" Brainstorm ways to resolve issues and develop a plan of action for the year. Set goals and document a strategic plan (including a timeline).
- ❑ Take a personal assessment/inventory of your own leadership skills so that you can identify areas of strength or comfort and opportunities for growth or development.
- ❑ Thank and recognize the outgoing officers for their contributions to the organization.
- ❑ Review important campus and organization policies and procedures, including the student handbook.

"Focus on the past, to celebrate those who created the world as it is today.

Focus on the future, to imagine the world as it will be tomorrow.

Focus on the present, to play your role in the transition."

- Author Unknown

Outgoing Officers

- Prepare a comprehensive document of events/key responsibilities. This should include timelines, task lists, and a budget.
- Be responsive to the incoming leadership and answer any questions they may have; share lessons you've learned along the way.
- Don't just "hand off the binder" and leave; if you are able to, continue to be an active and engaged member of the organization.

> *"Sometimes, you have to look back in order to understand the things that lie ahead."*
>
> \- Yvonne Wood, Dead Beautiful

- When you can, offer encouragement to the new leadership and speak positively about them; this may be challenging if you don't agree with their new direction, but trust they have the best interest of the organization at heart.
- Be respectful of the incoming leadership's transition, give them space to figure out what they are doing, but provide support when and how they need it.
- Reflect on the accomplishments, challenges, and lessons learned over the past term. Make sure you focus on your own personal growth and experience as well as that of the organization.
- Thank those individuals who were your support network throughout your leadership experience.
- Send important and/or interesting documents to University Archives.
- Facilitate an opportunity for old and new leadership to come together to discuss the current state of the organization, for outgoing leadership to share lessons learned, and for incoming leadership to ask questions.
- Introduce new leadership to important people and offices that are available to support them and be a valuable resource.

> *"It is necessary … for a man to go away by himself … to sit on a rock … and ask, "Who am I, where have I been, and where am I going?"*
>
> \- Carl Sandburg