

Transition Resources

Fundamental Tips for Organization Sustainability

Transitioning is an extraordinary opportunity to invest in your organization's success, reflect on your individual leadership style, and develop a plan to strengthen your coalition building & influencing skills. It is a time to learn how to use power constructively, examine the best practices for managing change, and learn about the systemic factors in your org's environment that can influence your future plans and success.

Constitution as your Foundation

Use your organization's constitution to:

- Clearly define what it means to be a member
- Clearly define officer responsibilities
- Outline election and selection plan
- Outline decision making processes
- Outline conflict and crisis management methods

Identify Important Documents

To ensure useful documents are passed down:

- Have current officers develop a document with relevant information and resources
- Restrict or enable access to important folders and files during the transition period
- Keep transition documents simplified so new officers are not overwhelmed by information

Effective Communication

To make communication a priority through the year:

- Choose the correct medium
- Respond or inform as soon as possible
- Keep communication professional, even if you are friends with members in the organization
- Encourage ownership of tasks
- Incorporate a way to track progress on goals
- Develop response guidelines which reinforce responsiveness between members

Develop Future Leaders

Actively develop incoming leaders by:

- Establishing training opportunities
- Empowering members to shadow positions and learn what they do

Incorporation Into Programming

Discuss the future in this year's programming by:

- Developing tasks and timelines that have a transferrable timeline or structure
- Incorporate an opportunity to debrief and pre-plan for next year after big programs

Election and Selection Process

Smoothly recruit and select new leadership:

- Communicate what a new officer should expect with developed criteria for successful candidates
- Provide inclusive support for potential candidates by providing office hours, info-sessions, and access to agendas/minutes
- Maintain a professional but welcoming environment
- Communicate individual and organizational benefits of becoming an officer

Retain Outgoing Experiences

Maintain appropriate outgoing relationships by:

- Conducting exit interviews during transition period
- Developing an outgoing officer evaluation template
- Having a plan for maintaining alumni connections

Retreat Gracefully

When it's time to transition out:

- Plan a celebratory, graceful transition for outgoing officers
- Step back, and allow the new leadership to build the organization
- Reflect on a job well done!

