A Thorough Leadership Transition Plan is:

- The responsibility of both the outgoing and incoming officers.
- A way to help the group avoid starting over or starting from scratch every year.
- A transfer of significant organizational knowledge.
- A way to minimize the confusion of leadership changeover.
- A way to give outgoing leaders a sense of closure.
- A great opportunity for outgoing leaders to evaluate the year.
- An orientation process for new leaders.

**What Do You Need To Transfer?**

- Effective leadership qualities and skills.
- Problems and helpful ideas, procedures and recommendations.
- Written reports:
  - Containing traditions, ideas or completed projects; continuing projects and concerns; or ideas never carried out.
- Personal and organizational files.
- Acquaintance with physical environment, supplies, equipment and any office procedures.
- Introduction to personnel (advisors, administrators, contacts, etc.).
- A complete record of the organization's structure, goals and accomplishments (through complete and organized files).
- Constitution and by-laws.
- Organizational goals and objectives for previous year(s).
- Job descriptions/role clarification's.
- Status reports on ongoing projects.
- Evaluations of previous projects and programs.
- Previous minutes and reports.
- Resources/contacts lists with addresses and phone numbers.
- Mailing lists.

**A Smooth Transition Is:**

- The responsibility of both outgoing and incoming members.
- A way to help the group avoid starting over each year.
- A transfer of significant organization knowledge.
- A sense of closure for the outgoing members.
- A utilization of the valuable contributions of experienced leaders.
- A time for the new leadership to absorb expertise from outgoing members.
- A great opportunity for outgoing leaders to evaluate the year.
- An orientation process for new leaders.
- The leadership changeover period.
- A time for incoming leaders to ask questions and seek advice.
- An outgoing leader’s last chance to say, “I wish I’d done this...”

**A Three Meeting Approach**

**Meeting 1**

- Review purpose/objectives of the position, organization, or committee.
- Review past programs and services.
- Evaluate the position and the committee or organization including responsibilities and expectations.
- Share problems, helpful ideas and recommendations.
- Show new leader reading materials and appropriate files for review before the next meeting.

**Meeting 2**

- Review the organizational manual which should include:
  - Organization structure (bylaws, constitution, etc.)
  - Resources
  - Committee Development
- Review the resources most often used by that position/committee.
- Be sure to keep the meeting an information-sharing session and not a how to meeting.

**Meeting 3**

- Introduce the incoming leader to people important to the carrying out of the tasks of the position (i.e., Tivoli room reservation, student activities staff, etc).
- Meet with the advisor together.