

Leadership Transition Planning Guide

A good transition isn't just the sharing of documents and login information with the next generation of leaders – it serves the purpose of re-energizing your chapter and helping your team take things to the next level!

In this guide you'll find the following:

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Sample transition timeline

Time	Action
Ongoing	All important how-to documents, valuable contact information, lessons learned, tricks of the trade, etc will be kept on Google docs, accessible to all chapter leaders.
Ongoing	VP of Events will track key data from event and store in Google docs, tracking attendance level, production costs, important timelines, whether event was a success, things to do differently next time, etc.
Ongoing	President and VPs will take note of active members who show leadership potential, giving vocal feedback and encouraging them to consider running for a leadership position in upcoming elections
Beginning Sept-Oct	VPs will invite members to join their committees to work on projects, have an opportunity to be more engaged and learn alongside current VPs (will be a natural incubator for potential leaders).
December	Hold a "Shadow Week": interested members can sit in and observe a leadership meeting; Pres and VPs will host a "happy hour" in the Student Union with snacks and refreshments open to all members to come chat with the team about their experience, ask questions about how to run for office and the benefits of being a leader.
January	Begin leadership outreach campaign: post open positions to chapter website, Facebook, and Twitter; ask partner clubs on campus to send leadership position opportunities to their listserv; post leadership opportunity flyers in Career Development Center; post individual leadership positions to specific departments with students who might be more inclined to apply . Make applications available online for positions that will begin end of spring semester.
February	Select new leaders through elections, applications, or interviews. Hold a leadership retreat and/or individual transition meetings with all outgoing/incoming leaders to transfer knowledge.
March/April	New leaders take their positions, working side-by-side with outgoing leadership.

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Six must-dos for a strong transition

Included below are six must-dos for a strong transition, three main recommended events to transfer knowledge and set goals for the coming year, key takeaways, and templates for documents to implement in your own transition process

- 1) Make the transition a year-round process.
 - Maintain a healthy **leadership pipeline** and election process throughout the year. Build in plenty of time to recruit new leaders, and to do some creative outreach if your applicant pool is low.
 - Have new board members write what was successful or difficult over the summer, and provide suggestions for next year's handover
 - Continually have board members note suggestions and information that would be helpful for next year's leaders
- 2) Develop an **orientation calendar** to plan elections, retreats, meetings, and the official date you'll pass the torch
- 3) Aim for **two months** where the outgoing and incoming leaders can work side-by-side
- 4) Promote **institutional memory** - pass on crucial "nuts and bolts" documentation like passwords, relevant contacts, Net Impact Central requirements and contacts, and process documents
- 5) Take advantage of a **fresh viewpoint** - what processes now seem outdated? How could things be done differently?
- 6) Notify your main Net Impact Central contact that your chapter has transitioned leaders via email with the name, email and leadership position of the new team. That way they can ensure that their chapter contact records are up-to-date and your new leaders can access the CLP!

Three Main Transition Events

- 1) **Transition Kickoff Meeting.** Bring together the **incoming and outgoing** boards to discuss lessons learned, reflect on the past year, inspire the team for the future and provide an outlet for large group discussion

Agenda

- Ice Breaker/Introductions (20 minutes)
- Reflections on the past year (30 minutes)
- Discussion of lessons learned (1 hour)
- BREAK (5 minutes)
- Inspiration & future planning with the group (45 minutes)
- Wrap up and next steps (20 minutes)

- 2) **Individual Strategy Meetings.** Set aside time for the incoming and outgoing **officers of a particular position** to transition and focus on the specific aspects of their role.

Agenda

- Review Knowledge Transfer Documents (see sample Knowledge transfer doc)
 - Calendar of events (What should be repeated/cancelled/improved?)
 - Ongoing initiatives (What is the background? What are next steps?)
- Review last year's committee goals and timelines

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- What worked/did not work?
 - Discuss the following questions (even if the answers seem obvious)
 - How does this committee fit into the club's mission?
 - How did this committee help the club achieve its goals last year?
 - Where is there room to change/grow/improve?
 - Who are faculty, admin, and professional contacts I need to know?
 - What do you wish you knew a year ago?
- 3) **Strategy and Goal-Setting Retreat.** Allow the **new board** an opportunity to review the previous year and freely make constructive changes to the mission, objectives and strategy going forward.

Agenda

- Ice Breaker/Admin Items (20 minutes)
- Set expectations for the year (1 hour)
- Review/re-write club mission and goals (1 hour)
 - Evaluation of goals and how they align with mission
- Pizza Break (20 minutes)
- Committee Updates From 1:1 Transition Meetings (30 minutes)
 - Show example of Careers Committee roadmap
- Wrap-up & Next Steps (20 minutes)
 - Final review of updated mission and goals
 - Schedule time to set committee goals/objectives and review w/ President
 - Schedule upcoming social event

Transition Checklist

Below is a high level list of events and deadlines you should be setting. Since chapter leader transitions happen at various times in the year for different chapters, we haven't included specifics as to when to hold these events. Instead, we've created a chronological list of all the events, processes and deadlines to include.

- Election information session
- Knowledge transfer documentation begins (current leaders)
- Set deadline for applications
- Open voting for leadership positions
- Announce new board
- Knowledge transfer documentation ends (now former leaders)
- Transition kick-off meeting (incoming and outgoing board)
- Individual strategy meetings by position (incoming and outgoing 1:1)
- Strategy and goal setting retreat (incoming board)
- Goal and strategy review
- Net Impact Social

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Knowledge Transfer Template

As you plan future events or think back to events that you've planned or hosted, use the framework below to compile all of the relevant information that you know about each specific chapter event or have gained throughout the process.

- Event/Initiative Name:
- Date of Event:
- Description:
- Location:
- Contacts (*administration, external, other clubs, etc*):
- Budget (*based on previous year*):
- Detailed Expenses:
- Strengths:
- Weaknesses and Challenges:
- Recommendations:
- Tasks to do Before Next Fall:
- Planning Timeline:
- For initiatives (i.e. Social innovation portal, alumni profiles) document current progress/next steps:
- Communications/documents you think would be helpful (Attach these in a separate doc):
- Additional Info (# of attendees, surveys, etc):

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Vision and Strategy

This document is intended for each of the executive board members to complete. The purpose is to not only set goals for the coming year, but to also plan the steps to how you will accomplish those goals and give definitive deadlines for each project.

List 3 - 5 measurable, attainable specific goals for the year:	
1	
2	
3	
4	
5	

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Spring		
Event/Initiative	Steps	Due Date

Fall		
Event/Initiative	Steps	Due Date

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Winter		
Event/Initiative	Steps	Due Date

A few key takeaways from this guide are to recognize the following:

- 1) Transitions are a process - Not a single discussion.
- 2) The more input the incoming board has, the more invested they are in executing throughout the year. Use this opportunity to generate enthusiasm & ownership!
- 3) Having defined, written goals that can be reviewed and used as a benchmark will help you manage your new team
- 4) Strategy and goals are not set in stone - review and adapt throughout the year as your team sees fit
- 5) It pays off BIG to take the time to do it right - set your team up for an amazing year!