



PALO ALTO COLLEGE

PACTIPS PACTIPS

Leadership Transition

Either you are a newly elected officer and you are trying to get a grip on your new position; or you are completing your term of office and you would like to leave gracefully and ensure that the organization continues with strong leadership. Whether new or old, making a successful leadership transition should be a concern.

BENEFITS

A planned, thorough leadership transition is important and had several benefits:

1. The most obvious is that it provides for a transfer of significant organizational knowledge. Your group will not have to re-invent the wheel each year.
2. It helps to minimize 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.
3. The process of transition can give the outgoing leaders a sense of closure. It can help them let go- which is often a difficult thing for committed leaders to do.
4. Leadership transition ensures that the valuable contributions of the experienced leaders will be utilized. They are often the most neglected members in your group.
5. Finally, the shared information results in the new leadership having more knowledge, and consequently, greater confidence in their abilities.

WHEN DO YOU START? EARLY!!!!

1. The best transition begins much sooner than in the spring when new officers are selected. The following ideas will aid the transition process.
2. Begin early in the year to identify emerging leaders in your organization.
3. Encourage these potential leaders through personal contact, helping develop skill, delegating responsibilities to them, sharing with them the benefit of leadership, clarifying job responsibilities and modeling an effective leadership style.
4. When new officers have been selected, orient them together as a group with all of the outgoing officers. This allows the new officers an opportunity to understand each other’s roles and to start building their team. In some cases, individual officers may also need to meet with their predecessor for more information.

ITEMS TO TRANSFER

- Outgoing officers, think to your own first weeks: what did you wish someone had told you?
- Effective leadership qualities and skills
- Share problems and helpful ideas, procedures and recommendations
- Write and share reports containing traditions, recommendations, completed projects, continuing projects and concerns and ideas never carried out
- Go through personal and organizational files together
- Acquaint new officers with physical environment, supplies and equipment
- Introduce related personnel (advisors, contacts, etc.)
- Constitution and by-laws
- Job descriptions/role clarifications
- Organizational goals and objectives (including those from previous years)
- Status reports on ongoing projects
- Evaluations of previous projects and programs
- Previous minutes and reports
- Resources/contact list
- Financial books and records
- Mailing lists
- Historical records, scrapbooks equipment

OUTGOING OFFICERS

If you are completing your term of office, do not run out on the new leaders! Sharing your experience and knowledge will help them make a successful transition into their new office.

NEW OFFICERS

If you are a new leader, take the initiative to learn more about your position. Be assertive and request some training from the outgoing officers. Do not wait until the fall term when these experiences people are no longer around.



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