**Leadership Transition**

*Leadership transition is a means for new officers to become acquainted with an organization’s procedures and policies by receiving information from the advisor and outgoing student leaders*

Leadership transition between old and new chapter officers is like passing a baton between two members of a relay team at a track meet. Just as a smooth transfer of the baton reduces time and creates the potential for placing, so leadership transition makes the critical difference between a successful and productive year or one in which officers feel like they are always running behind trying to catch up. Leadership transition, then, is an exchange of organizational information between outgoing officers and succeeding ones.

The leadership transition period does not begin when the new officers have been elected or installed. It starts at the time when discussion about making or accepting nominations for office ensue and continues through the early weeks of the new term. You might be inclined to say, “If it takes that long, is it worth it?” Although it takes time and energy, developing a process for leadership transition offers valuable benefits to the organization:

One, it encourages students who have potential but little self-confidence to consider running for an office since they will have an opportunity to work with outgoing officers and gain information.

Two, it minimizes post-election disruptions since new officers have enough information and training to assume responsibility, thus maintaining the organization’s productivity. For example, they are able to answer committee members’ questions and work with people on campus. By sharing information, members are also more satisfied since they feel part of a team.

Three, transition programs take full advantage of the rich experience and collective wisdom of outgoing officers by offering them a greater challenge through the incentive to serve the organization in an advisory role.

**Pre-election activities**

A month or two before nominations, outgoing officers should identify potential officers from the current membership. If the group is small (less than 30), the present officers can divide the membership into groups of five to 10 people and spend a half-hour with each person. During this time, the officer will learn as much as possible about the members’ interests, organizational aspirations, strengths, weaknesses, values and needs. In addition, the officer will identify and explain the responsibilities of vacant positions.

If the group is too large for individual contact, other process may be used. For example, at an organizational meeting a month or two prior to nominations, officers can explain in detail the general structure, offices and goals of the group and supplement the presentation with handouts. Current officers can be available to answer questions and to identify potential officers. A list of interested students’ names would be given to the chairperson or president. Then, the individual follow-up described above could be used.

After completing the individual discussion with the members, the outgoing officers should then compare notes. Using this collective information then can proceed with nominations.

The process just described assumes that all offices are accessible to all members. If this is not the case, that fact should be explained early in the presentation and the membership should be aware of any formal or informal qualifications such as seniority rights to offices or financial obligations. (e.g., the tradition of the president footing the bill for an officer party or special attire required at social functions).

**Nominations and elections**

Chapters generallyhas a specific process for holding elections. A slate of nominees, which lists available candidates, may be prepared by outgoing officers, who select individuals on the basis of an interview, application or references. Nominations may be taken from the floor at a meeting or members may volunteer their services with consensus approval by the group. Whatever method is used, the following points should be considered when re-examining the nominations and elections process.

* Enthusiasm, sometimes referred to as “a great personality,” may be one of the primary qualities needed for leadership but it should not be the primary criterion for selecting individuals to run for office.
* Encouraging members to nominate themselves for office can be tricky at best, disastrous at worst.
* During the period of nominations and election members should be encouraged to consider the benefit of establishing heterogeneity and balance in the slate of officers. Choosing a group of candidates because they are likely to get along well or think alike is fraught with pitfalls. This may eventually lead to the dangerous creativity stifling phenomenon known as group-think, where people are afraid to tell the truth or to express different ideas to the person in charge.
* A criterion for selecting a balloting method should include the effect it may have on unsuccessful candidates. The secret ballot is preferable to a show-of hands since peer pressure tends to be eliminated.
* As a precondition to accepting a nomination, those running should agree to participate in post-election transition programs.

**Post-election activities**

Post- election activities are the heart of the transition process. The key to ensuring a successful transition is to make sure the new officers are aware that their participation is a fundamental obligation of holding office. Throughout the nomination and election period, dates, times and places for transition events should be announced repeatedly.

The general format, site arrangements and schedule of the post-election activities should be worked out well in advance with primary responsibility for planning, selling and conducting the sessions resting with the advisor and outgoing officers. However, it is preferable for old and new officers in the consultation with the advisor to jointly determine the specific content of the program.

The following paragraphs list topic priorities. The first four items are necessities while remaining topics should be selected on the basis of the groups’ particular needs and time constraints governing the process.

An *historical perspective* of the organization should be presented by the outgoing officers and advisor. A review of formal organizational documents, policies, procedures and officers’ job descriptions should be included in addition to background information about the organization, its members and moods (the informal norms and dynamics of the group).

Outgoing officers should review with the new leaders the previous year’s goals, projects and activities, describing both successes and failures. If time is limited an outline of these activities can be written and distributed before transition meetings. Updates should identify completed and abandoned projects as well as those still in progress. Ideas for future projects may also be suggested.

Outgoing officers and advisors should identify available and necessary resources needed by officers. These may include basic services and materials suppliers as well as institutional and organizational friends and foes.

*Financial Procedures* and a summary and projection of budget allocations and revenues should also be discussed by the outgoing officers and advisor. Topics should include the basis and rationale for allocations and previous year; budget categories and estimated line-item expenditure as well as suggested budgetary changes; outstanding bills and encumbrances; processes, forms, deadlines, expenditure authority, etc. for completion of financial transactions; and if applicable, current and potential sources of funding.

*Roles and Relationships* may be clarified in a discussion by the outgoing officers and advisor with active participation by incoming officers. Everyone should understand their roles with the organization as well as their relationship with the advisor, other elected officers, appointed officers and committee chairpersons, the general membership and significant others, such as administration who may have a role to play in the organizational process.

*Skill- building sessions and exercises* may be facilitated by outgoing officers, the advisor, or knowledgeable incoming officers. It is helpful to pre-test individuals for competency levels before the training. One topic area for such exercises is programming, including management of human and material resources, assessment of students cultural and educational interests, program evaluation methods, and technical aspects such as contracts, talent negotiation, publicity and promotion. Another topic is basic organizational skills including conducting a meeting, goal setting, planning by objectives, correspondence, taking and writing minutes, preparing agendas, alternative decision-making strategies, conducting nominations and elections, and recruiting, selecting and working with committees.

*A comprehensive and theoretical leadership training* may be led by the advisor, knowledgeable outgoing offices and outside consultants or someone from the student activities office. Topics may include exploring, recognizing and dealing with different leadership styles as well as situational leadership, communications skills, conflict resolution, motivation theories, teambuilding strategies, problem solving, decision making, and time management.

Incoming officers may want to *set goals* for the coming year and present them to the general membership at the first meeting where alternative courses of action for the future can be reviewed, discussed, revised and adopted.

**Transition format**

There are several options by which to accomplish transition objectives. To a large extent the format selection will depend on how much time the old and new officers have or are willing to devote to individual information sharing and orientation sessions. Other considerations include the complexity of the organization, number of offices, the experience and skills of the incoming group members and time during the school year elections are held.

The minimum amount of time needed to conduct a transition is four hours. Many groups, however, find they are hard pressed to cover all the necessary information in two full days.

A transition workshop may be a weekend retreat or morning seminar where the essential information is presented to incoming officers. The advisor and outgoing officers may have prepared lectures, experiential exercises and handouts to facilitate the transfer of necessary details.

A second less time consuming alternative for transmitting transition information is the independent study. Individually, new officers review written orientation materials prepared by the outgoing officers, such as binders and workbooks. With the increasing attraction of mixed media presentations, creative transition materials can be developed using videos or other formats. However, a half-hour follow-up session among the old and new officers and advisor should be scheduled.

Showing is another effective technique which requires that only two people be in the same place at the same time instead of the entire group. The recently elected officer shadows the outgoing person as organizational business is transacted on campus or in the community and as duties are performed. In effect, the new officer is a trainee and observer while the experienced officer is a trainer, clarifier and interpreter of the content, people and processes which are encountered. If this method is used, ample time should be provided for the two to discuss the activities. Observation without a thorough evaluation of the reasons for each transaction is not enough.

Mentoring is similar to shadowing whereby old and new officers are paired for discussion and orientation. The new officer models the desirable behavior of the outgoing officer, thus learning by example the responsibilities of the position.

Learning contracts are another training method whereby required skills of the office are listed and news officers agree to show proof of knowledge by completing certain tasks. For example, a learning contract statement might include “know the forms for registering the organization on campus and the required signatures.” Knowledge of this information might be evidenced by a new officer simulating an actual filing of the paperwork and returning the completed forms to the advisor who checks for accuracy.

Another possibility is to have incoming officers hold a structured interview with their outgoing counterparts. To ensure that the discussion will be productive, specific interview questions or an outline should be provided. Questions and topics should be taken from the priorities suggested for leadership transition.

In summary, leadership transition is a means to maintain organizational productivity by having experienced outgoing officers assist in the training and sharing of information with their peers who are taking leadership positions. By planning leadership transition, succession of officers can be like the relay team who wins the race.