

Article for Branch Newsletters and/or Summer FOCUS

Transition to a New Year

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The goal of this article is to help branches find ways to better transition when there is a change in leadership. Too often we ask someone to take a leadership position and then do not give them the tools that will make their transition easier. Dropping off a box of unsorted materials you probably inherited from your predecessor is not the best way to help them be successful.

Smooth transition actually begins when you take office. If it has not been done by your predecessor you should make a file that will be turned over to your successor. In the file you should keep:

- A page containing your job description, responsibilities or expectations.
- A list of dates important to the position.
- A month by month time line.
- Correspondence that relates to your job or the activities you are responsible for.
- A list of contacts and resources you have used in carrying out your duties.
- An annual report relating your accomplishments and suggestions for the future.

Following are some tips to help make the transition easier for the incoming officer, director or chair:

Before the end of your term in office you should purge files of items that need to be archived and turn them over to the appropriate person. Straighten up what you believe will be useful to the next person and get rid of items that hold no value. Be sure to indicate the items which must always be available – bylaws, procedures, position descriptions, legal documents if incorporated, the signed national agreement, etc.

Transfer the items to the incoming counterpart in a timely fashion so they know the expectations before their term actually begins. If you have no more duties that require you to use your files, you should turn them over as soon as you can arrange to meet in person with the incoming officer/director/chair.

Choose an informal setting and allow enough time to go through the documents you have prepared and give them an opportunity to ask questions.

In discussions with your successor be honest about the time commitments and resources they will need to be successful. Try not to relate anecdotal stories of bad experiences instead try to tell them things to avoid that might help prevent pitfalls.

Let your successor know that you are open to questions at any time and be supportive. If each director would prepare for transition in these ways, board experiences might go more smoothly and it might not be as difficult to get officers and directors.