

CREATING A PLAN OF SUCCESSION

An orderly transition of officers is the glue that holds an organization together. It implies stability, confidence, and continuity of operation. We must also be prepared for unexpected vacancies with a written succession plan in place. This can help the club handle the inevitable challenges of leadership transition.

Tips for Leadership Transitions:

- Identify present and future challenges and the qualifications necessary for a leader to meet them. Prepare a job description to provide a complete explanation of the role and responsibilities.
- Have an established timeline for leadership succession.
- Establish an Emergency Plan, similar to a lesson plan, to include delegation of duties and authority during an unexpected transition.
- Provide leadership development for all members so they will have a broader knowledge of the club, state, and international activities.
- Enlist the support of all members for newly placed officers.
- Help new officers feel confident enough to find their own voice.
- Avoid micromanaging new officers. Give them the opportunity to do their job but assist when asked to do so.

Careful planning is necessary for a successful transition. A strong transition plan helps members feel confident and secure. Create a structured process to ensure leadership continuity and to retain and develop knowledge and relationships in the future. A powerful succession plan focuses on ensuring the flow of information is open and concise for the new leadership.

Transition planning also helps the current leaders “let go” through sharing the information. There is no “easy” button for leaders, but members who have served in a role for a long time can face especially tough transitions. They are proud of past achievements and are attached to the projects they leave behind.

No matter how long or well a leader has served, it is best for all clubwomen to have a plan for transferring knowledge and authority and letting go of role “ownership.” Somehow, all the information that is stored only in the leader’s head must be accessed and captured. But how? Consider creating a Transition Plan Checklist:

TRANSITION PLAN CHECKLIST

PART 1 OFFICER TRANSITION - A CHECKLIST FOR OUTGOING OFFICERS:

This checklist is intended to provide a complete orientation for new officers. The orientation should be presented by your outgoing officers. The ideas below generally apply to all organizations, but some may not apply specifically to your club.

A. INFORMATION ABOUT THE OFFICE:

Applicable & Completed (x)

- | | |
|-------------------------------------------------|-------|
| 1. Review any available club or other histories | _____ |
| 2. Review applicable bylaws and standing rules | _____ |

3. Review the goals and objectives for the prior administration _____
4. Introduce officer to key contact people – include telephone numbers and email addresses _____

B. OFFICER'S ROLES AND PRINTED MATERIALS:

1. Review and pass along records, binders, files, notebooks, and important correspondence _____
2. Review job/officer descriptions _____
3. Review officer's written expectations _____
4. Review your agendas and minutes _____
5. Review prior project evaluations _____
6. Review previous minutes, financial records, and mailing lists _____
7. Review your achievements _____
8. Review your challenges _____
9. Pass along membership list, contracts, addresses, phone numbers, email addresses, and related information _____
10. Provide financial information, including treasurer's accounts, fundraising information, and copies of completed requisitions _____
11. Visit the financial institution to change account authorized signatories and officers _____

PART II OFFICER TRANSITION - A CHECKLIST FOR INCOMING OFFICERS:

This checklist was designed for new officers to use as they begin their respective roles. This can be used with outgoing officers to answer the questions of new officers, or with new officers after they have met with outgoing officers.

A. PREPARATION OF NEW OFFICERS:

Applicable & Completed (x)

1. Understand present and future programs _____
2. Develop a master calendar with meetings, programs, and events _____
3. Update your organization's website, contact information, office space, voicemail, and other items as necessary. _____
4. Establish structure for meeting agendas _____
5. Discuss meeting details (place, time, and promotion) _____
 - Officer and Board of Directors meetings _____

- Club meetings _____
- Region meetings _____
- GFWC Annual Convention _____

B. GOAL SETTING FOR NEW OFFICERS:

1. Establish new officer's, personal, club, district, and state goals _____
2. Prioritize officer's goals to members' goals _____
3. Plan a goal setting meeting/retreat _____
4. Plan to present goals to members _____
5. Help prioritize organization goals with entire membership _____

Transition Checklist adapted from the GFWC Leadership Newsletter, March 2020

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