Planning a Leadership Transition Part 2/2

The Bonner Community Engagement Curriculum

BWBRS Description: Bonner Curriculum workshop guides participants to prepare for a leadership transition for their partner sites.

Overview: This training is designed to guide participants in organizing their transition out of a leadership position in a program. It aims to assist a student leader in determining the important information that should be passed on to the next leader. It also provides suggested methods to convey that information including the guidelines for developing a concrete transition binder that can serve as a reference for incoming leaders.

Category: Transitional leadership; project management; reflection skills

4th year

Level: Advanced

Recommended Bonner Sequence: This workshop should be used during student's senior year, or whenever they are transitioning to a new program.

Learning Outcomes:

- To assist student leaders or outgoing staff in the often-daunting task of transitions, making it easier for them to prepare a good transition package for the incoming leader/staff member.

- To allow for student leaders or staff to reflect on their experience as a leader and manager, and provide that experience with meaningful closure.
- To provide an opportunity for student leaders or staff to share their reflections with other outgoing and incoming members in a productive and useful manner, strengthening outcomes of leadership transitions for all involved.
- To provide structure to create the basics of the transition binder that will serve as a concise, readable, and well-organized reference for incoming leaders and beyond.

Materials:

- Pens
- Large flip chart pre-labeled with brainstorm headers and markers
- Copies of the warm-up sheet, the brainstorm worksheet and the binder checklist for all participants
- Binder materials for distribution to all participants; dividers and 2" binders.

How to Prepare:

This training will guide you through a brainstorming and sharing session that allows out-going leaders to self-reflect on their previous leadership experiences to better prepare their replacements for the upcoming transition. It will close with the preliminary creation of a transition binder for the students to flesh out afterwards, and review and provide to their incoming replacement.

Brief Outline:

This 1-hour workshop has the following parts:

1) Warm Up	Suggested time: 5 minutes
2) Creation of Binder	Suggested time: 40 minutes
3) Closing	Suggested time: 15 minutes

Part 1) Warm-up

Suggested time: 5 minutes

Begin by reminding students of what they covered during the first have of their leadership transition workshop and asserting where this training is going.

Part 5) Initial binder formation using in-depth reflections

Suggested time: 40 minutes

Inform students that the heart of the transition lies in their thoughtful contribution of information to their replacement. Now you will have them look at a couple of the above brainstorm topic in a more in-depth manner. Binder materials should be distributed by this time.

Binders should contain the transition binder-indexing guide, four dividers, and triple-hole-punched copies of the "Toughest Challenges" worksheet, the "Key Personnel" worksheet, and the "Recruitment" worksheet. The key sections of the binder index are:

- People
- Documentation and Methodology
- Key Initiatives and Activities
- Personal Notes and Observations

Your primary objective for this final part of this workshop is to guide students through more thorough personal reflection and to help these students classify these reflections into the binder. This head start on production of the binder allows students to leave the training more willing to complete the somewhat daunting task of creating a transition binder by giving them the tools of knowledge and structure for its completion.

A) Toughest Challenges

Have the students pull out the "Toughest Challenges" worksheet. Introduce the next five to ten minutes as an opportunity for them to more completely reflect on this subject and to break it down into smaller ideas by having them classify the challenges as personal, group/organization based and campus based.

After students spend five minutes or so completing these sheets, point out the "What's Next?" category. Ask for a volunteer who might explain why they feel that their toughest personal challenge could be related to their own personal leadership style, and why having a conversation about leadership style might be important. Point out that the knowledge simply of the challenges past leaders have met will not necessarily help the incoming leaders to avoid these same challenges in the future. In addition to the information about these challenges, discussions about leadership style, group/organization expectations and campus infrastructure are also important so the incoming leader can understand fully all of the elements that relate to their position and their success in that position. Have the students file this sheet in the Personal Notes and Observations section of their binder and move on to the next sheet.

B) Key Campus Personnel

Have the students pull out the "Key Campus Personnel" worksheet. Have them spend another five or so minutes filling out the sheet. Charge them to complete the sheet as much as possible. Also, remind them that these persons needn't be administrators or faculty, but could also include staff, or even other students with titled positions.

Again after completion of the worksheet, have students note the "What's Next?" category. Point out the idea of both introducing the student and taking a walking tour of key campus offices as a good way of insuring that the student not only has a list of who to contact, but where to find that person.

C) Recruitment Tools and Techniques

Fliers are often the non-specific contribution to the incoming leader's knowledge of recruitment for the organization from the outgoing leader. Fliers are easily manufactured but don't often guarantee successful recruitment. In this worksheet, students will better detail their recruitment campaigns, which may have incorporated not just fliers on campus billboards, but also door-to-door flier distribution, tabling in cafeterias or student unions, newspaper ads, theatre demos, phone-calls, letters, etc.

Give the students about 10 minutes to fill out the methodology and documentation columns of the recruitment worksheet. Tell them to attempt to list completely the methods of recruitment used by the organization in the past year, or at least all those they headed. There is an "included?" category in the documentation category. Explain to students that they should check this column only after they have added that document to the binder.

After the ten minutes, challenge students to take a look at the "What next?" column. Unlike the previous pages there is nothing listed in this column. It is up to them to include the next steps. The "What Next?" steps should be different from previous ideas, and should not include providing the copies of fliers, ads, etc, as that is part of the documentation. One idea of the type of information that could be included is a personal note on the effectiveness of the recruitment method, and what may have improved it. Another idea of the type of information students should list here is the key personnel linked to this particular recruitment method.

For example:

> If tabling in the opportunities fair for new students in the first month of school is the recruitment method, and the documentation might include the materials like a general information flier for 100 persons, or notebook for student contact info, etc., the "What's Next?˝ column should include the person (administrative or staff probably, like the Dean of Freshmen's assistant) who is responsible for the overall opportunities fair.

Give students another five minutes or so to complete this "What's NEXT?˝ column. When all have completed the worksheet, have them file this under the Documentation Column.

Part 6) Closing

Suggested time: 15 minutes

Before closing, have the students look over the binder index and the transition checklist. Both the index and checklist can serve as guides for the type of information the students should continue to add to the binder and a check system for each time a document is added. Charge students to continue to work on the binder after they leave, perhaps to add even the contact lists and fliers as soon as they return to their organization's office. It is also recommended that you provide students with a deadline for the binder's completion whereby you can look it over and students can discuss any difficulties or questions they might have (this is more applicable to trainers who are also supervisors of the students).

In closing, reiterate the importance of a smooth leadership transition and the outgoing leader's critical roll in the process. Remind the students that the outcome of the transition is entirely up to them, but that this training was designed to give them the tools and ideas to generate all the necessary information and how to organize it in the most concise and effective manner. Ask students if they feel this training was helpful and what they suggest should be added in the future. Evaluation is critical, as trainings are more effective if they are catered to their participants.

Transition Binder

Sample Contents

People

- Organization Membership List (with contact info)
- Campus Contacts
  - Other organizations
  - Administrative
- Community Liaisons
- Funders
- Press

Documentation and Methodology

- Organization constitution
- Recruitment fliers and methods
- Training materials
- Advertisements and previous press
- Grants and other funding
- Miscellaneous forms

Key Activities and Initiatives

Personal Notes and Observations

- What worked
- What didn't work
- Challenges

TOUGHEST CHALLENGES

My Top Three Toughest Challenges as a Leader were:

CATEGORY	DESCRIPTION	What's NEXT?
PERSONAL		Make sure you have a conversation with your incoming leader about leadership style
GROUP/ ORGANIZATION		• Make sure you have a conversation with your incoming leader about organizational expectations
CAMPUS-BASED		• Make sure you have a conversation with your incoming leader about campus infrastructure

KEY CAMPUS PERSONNEL

The names and positions of Five Key People on Campus and what they get done are:

NAME, POSITION	CONTACT INFO	WHAT THEY DO	WHAT'S NEXT?
			• Make sure you introduce this person to your replacement. • take a walk with your replacement around campus be sure to identify the locations of key administrative and staff offices. • fill in contact information for these persons later if you don't know it already.

RECRUITMENT TOOLS AND TECHNIQUES

METHODOLOGY		DOCUMENTATION		What's NEXT?
Recruitment method	Description	Paperwork/ fliers	Included?	Key contacts for success

√ Checklist for Transitioning Leaders

Utilize this checklist as a guideline for developing the transition binder. Mark off information only after it is gathered and organized. Keep the checklist following the index at the opening of the binder.

	Names and contact information for community contacts/partners/agency representatives
	Name and contact information of service participants (For example, students' names and mailboxes/emails and volunteer status. If you use a listserve, in addition to the suggest contact information, be sure to provide an explanation of how to use the list serve)
	Names and contact information of key campus personnel including deans, provosts, administrative assistants, housing and rooming authority, etc. with personal notes of interest. Example: "The Dean of Students Assistant, Jane Do-gooder is responsible for all space requests so be sure to introduce yourself and be especially nice to her!"
	Original copies of any forms, schedule sheets or training materials/handouts you may use with your volunteers (list below) ____ ____ ____ ______________________________
	Original copies of any flyers, advertisements, handbills, or other recruitment tools (list below) ____ ____ ____ ______________________________
	Notes on past history of your program—including any press you may have received from campus or local newspapers
	Personal notes and observations from the past year indicating what worked well and what was problematic throughout the course of the year