Logo

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***The single biggest problem in communication is the illusion that it has taken place.***

**George Bernard Shaw**

**Communicating Leadership Expectations**

The following are guidelines that will help you as you begin the transition process. As you review with the incoming leader the scope of responsibilities noted in the transition document, the questions listed can serve as an assessment tool to determine what knowledge may be lacking or particular leadership and/or management skills that will need further development. These questions can also be used as a focal point for discussion within your nominations committee. While many of you may not think that you have the abilities to work in the role of a coach and may be uncomfortable with the terminology, as you begin reviewing board or committee position responsibilities with incoming leadership, you will be communicating with the other person in a coaching capacity.

**Leadership or “Coaching” roles that you will be assuming:**

* Guide
* Teacher
* Motivator
* Mentor

**Coach as a Guide:**

Does the person you are coaching…

* Have a clear understanding of his or her role in the organization?

In other words, do they understand what the chapter is trying to accomplish and how their skills and abilities can contribute?

* Have clearly defined tasks and/or responsibilities?

Can the person articulate the specific tasks and responsibilities that compose his or her role?

Will achievable, interim steps be identified that when accomplished in sequence, will result in successful completion of tasks?

**Coach as a Teacher:**

Does the person you are coaching…

* Possess the skills to accomplish/fulfill the task/responsibility?

Can the person acquire the needed skills?

* Possess the knowledge necessary to accomplish/fulfill the task/responsibility?

Does the person know what he or she doesn’t know?

**Coach as Motivator:**

Does the person you are coaching…

* Have a high level of commitment to the task/responsibility?

Does the person feel a sense of ownership for the completion of the task?

* Have an awareness of positive consequences that will result from success and negative consequences that will result from failure?

Are there consequences directly tied to his or her contributions?

* Have a firm belief that he or she can accomplish/handle the task/responsibility?

Is the person under-confident or over-confident?

* Find the task/responsibility interesting and/or enjoyable?

Can the person find meaning in his or her role and even have fun with it?

* Have a natural inclination or aversion to the task/responsibility?

Does his or her role fit his or her personality? Did the person choose his or her role or did circumstances place him or her there?

**Coach as a Mentor:**

Does the person you are coaching…

* Have a well-defined career path?

Does the person know what kind of position he or she would like to have in the future? How does the person’s current position advance him or her toward their future leadership goals?

# **President Transition Document**

**Incoming President**: Enter Name.

**Phone/Email**: Enter phone and email

**Current President**: Enter Name

**Phone/Email**: Enter phone and email

**Review of role, responsibilities and leadership attributes.**

Click or tap here to enter text.

**Challenges Faced by the President:**

Click or tap here to enter text.

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Ideas to improve current processes/procedures:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:** Click or tap here to enter text.

**Areas of concern regarding board structure and directors:**

Click or tap here to enter text.

**Areas of concern regarding committee structure and chairs:**

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

# **President-Elect Transition Document**

**Incoming PE**: Enter Name.

**Phone/Email**: Enter Name.

**Current PE**: Enter Name.

**Phone/Email**: Enter Name.

**Review of role, responsibilities and leadership attributes.**

Enter Name.

**Assessment of my strengths and weaknesses and determine how as President and PE we can best collaborate together to support each other’s strengths and develop weaknesses.**

Click or tap here to enter text.

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Ideas to improve current processes/procedures:**

Click or tap here to enter text.

**Challenges Faced by the PE:** Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:** Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

# **Immediate Past President Transition Document**

**Incoming IPP**: Enter Name.

**Phone/Email**: Enter Name.

**Current IPP**: Enter Name.

**Phone/Email**: Enter Name.

**Review of role, responsibilities and leadership attributes.**

Enter Name.

**Assessment of my strengths and weaknesses and determine how as Immediate Past President I can best collaborate with the President and President-Elect.** Click or tap here to enter text.

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Ideas to improve current processes/procedures:**

Click or tap here to enter text.

**Challenges Faced by the IPP:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:** Click or tap here to enter text.

**Think back to July 1st . What would I do differently?**

Click or tap here to enter text.

# **VP Finance Transition Document**

**Incoming VP Finance**: Enter Name.

**Phone/Email**: Enter Name.

**Current VP Finance**: Enter Name.

**Phone/Email**: Enter Name.

**Review of role, responsibilities and leadership attributes.**

Enter Name.

**Strategic Goals and Objectives of this position and the supporting committees:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the VP Finance and Executive Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st . What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

(chapter to provide information)

* **Support Committee chairs list with contact information**
* **Description of all programs/initiatives that were planned by the reporting committees including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new board position**

# **VP Membership Transition Document**

**Incoming VP Membership**: Enter Name.

**Phone/Email**: Enter Name.

**Current VP Membership**: Enter Name.

**Phone/Email**: Enter Name.

**Review of role, responsibilities and leadership attributes.**

Enter Name.

**Strategic Goals and Objectives of this position and the supporting committees:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Insert objectives and actions as submitted in the current business plan

**Challenges Faced by the VP membership and Supporting Committee:**

Insert objectives and actions as submitted in the current business plan

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Insert objectives and actions as submitted in the current business plan

**Think back to July 1st. What would I do differently?**

Insert objectives and actions as submitted in the current business plan

**Attached to this document please include the following:**

(chapter to provide information)

* **Support Committee chairs list with contact information**
* **Description of all programs/initiatives that were planned by the reporting committees including any vendors/sponsors that were used**
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* **Any other materials that you feel would be helpful to the new board position**
* **Any other materials that you feel would be helpful to the new board position**

# **VP Education Transition Document**

**Incoming VP Education**: Enter Name.

**Phone/Email**: Enter Name.

**Current VP Education**: Enter Name.

**Phone/Email**: Enter Name.

**Review of role, responsibilities and leadership attributes.**

Enter Name.

**Strategic Goals and Objectives of this position and the supporting committees:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Insert objectives and actions as submitted in the current business plan

**Challenges Faced by the VP Education and Supporting Committee:**

Insert objectives and actions as submitted in the current business plan

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Insert objectives and actions as submitted in the current business plan

**Think back to July 1st. What would I do differently?**

Insert objectives and actions as submitted in the current business plan

**Attached to this document please include the following:**

(chapter to provide information)

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* **Description of all programs/initiatives that were planned by the reporting committees including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new board positionAny other materials that you feel would be helpful to the new board position**

# **VP Communications Transition Document**

**Incoming VP Communications**: Enter Name.

**Phone/Email**: Enter Name.

**Current VP Communications**: Enter Name.

**Phone/Email**: Enter Name.

**Review of role, responsibilities and leadership attributes.**

Enter Name.

**Strategic Goals and Objectives of this position and the supporting committees:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Insert objectives and actions as submitted in the current business plan

**Challenges Faced by the VP Communications and Supporting Committee:**

Insert objectives and actions as submitted in the current business plan

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Insert objectives and actions as submitted in the current business plan

**Think back to July 1st. What would I do differently?**

Insert objectives and actions as submitted in the current business plan

**Attached to this document please include the following:**

(chapter to provide information)

* **Support Committee chairs list with contact information**
* **Description of all programs/initiatives that were planned by the reporting committees including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new board position**

# **Sponsorships & Advertising Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

(chapter to provide information)

* **Committee List with contact information**
* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **Scholarships Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

(chapter to provide information)

* **Committee List with contact information**
* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **Special Events Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

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(chapter to provide information)

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* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **Chapter Awards Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

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* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **Technology Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

(chapter to provide information)

* **Committee List with contact information**
* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **Newsletter Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

(chapter to provide information)

* **Committee List with contact information**
* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **Public Relations Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

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(chapter to provide information)

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* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **Leadership Development Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

(chapter to provide information)

* **Committee List with contact information**
* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

# **CMP, CMM Committee Transition Document**

**Incoming Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Current Committee Chair**: Enter Name.

**Phone/Email:** Enter phone and email

**Review of roles, responsibilities and leadership attributes:**

Click or tap here to enter text.

**Direct report:** Enter Name.

**Strategic Goals and Objectives of this committee:**

Insert objectives and actions as submitted in the current business plan

**Successful Processes which should be continued:**

Click or tap here to enter text.

**Challenges Faced by the Chair and Committee:**

Click or tap here to enter text.

**Action Items/Pending Issues:**

Click or tap here to enter text.

**Recommendations of ways to support or streamline current challenges and pending issues:**

Click or tap here to enter text.

**Think back to July 1st. What would I do differently?**

Click or tap here to enter text.

**Attached to this document please include the following:**

(chapter to provide information)

* **Committee List with contact information**
* **Description of all programs/initiatives that were planned by the committee including any vendors/sponsors that were used**
* **Copies of all meeting notices or marketing materials**
* **Any other materials that you feel would be helpful to the new chair of the committee**

**Conclusion**

***The quality of leadership more than any other single factor, determines the success or failure of an organization.***

Fred Fiedler & Martin Chemers, *Improving Leadership Effectiveness*

**Commitment**

How often have new leaders searched for a missing committee manual (that most likely departed with the outgoing leader) and struggled to re-create responsibilities and procedures? In order to build a strong leadership foundation, it is vital that there is a commitment from incoming and outgoing leadership to spend time together to create an effective transition of roles, responsibilities and expectations. We can all create wonderful processes and procedures but if they are not implemented, we will have failed to provide what was determined as most needed by chapters: tools and processes to support leadership development.

We encourage you as an effective leader to take the time to coach, train, guide and mentor volunteers. By doing this you will not only be creating a blueprint for future leaders, you will also experience giving back to the chapter the legacy of your leadership.