

# Leadership Transition & Development

*The keys to smooth leadership transition are good record keeping and clear job descriptions.*

## Beginning a Term of Office

- Meet with predecessors to transfer records, reports, and any other materials required for your office. Discuss the regular order of business and upcoming events.
- Update bank account information and any other legal or financial records.
- Go through all materials provided by your predecessor. Make a list of what is included and another list of additional materials and supplies you need.

## Ending A Term of Office

- Be sure all records are up-to-date and organized. Make a list of what is included in the materials you are transferring to your successor.
- Meet with your successor to orient them to the regular order of business, upcoming events, unfinished business and materials you are transferring to them.

## Developing New Leaders

Every member of your chapter is eligible to fill nearly every leadership role, but the offices of President and Vice President must be filled by RPTs. While an RPT designation is a sign of technical competence, it does not guarantee that someone has the skills and commitment needed to be a chapter leader. An important step in developing new leaders is to develop new RPTs. Look for new and current RPTs and Associates interested in become chapter leaders. Leadership development and RPT exam preparation activities should both be included in your chapter's professional development program.

First of all, talk with your candidate to find out if they are interested in a leadership position. They may already have experience and knowledge gained from a job or volunteer position. You need a wide variety of skills, interests, and experience to make up a successful leadership team.

A good way to start someone out in a leadership role is to assign them a committee position or team role on a specific project (i.e. a seminar, exhibit booth, etc). Have them work with an experienced member who can function as a mentor. After you've had a chance to assess their potential, talk with them about their experience and discuss future leadership opportunities. Be sure each chapter position has a written job description with clear expectations of duties and responsibilities. Never place someone in a leadership role without making sure they understand what is expected of them.

Many organizations have an established leadership success plan. They frequently start with an individual appointed to be a committee member, then a committee chairman, election as a board member, then chapter officer. The Vice President's position may also function as a President-elect or the position of President-elect can be a regular board position. In smaller chapters where one individual may fill several roles, the leadership route may be much quicker. You may also have individuals who, because of previous experience, are equipped to immediately assume board positions.

As you begin to identify potential chapter officers, look at the PTG Code of Professional Conduct and Principles for PTG values related to leadership.