

Building Successful Medical Student Organizations by Optimizing Leadership Transitions

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Capstone for Impact Project: Graduation Year 2021

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Background

Medical student organizations represent an experiential opportunity for practicing skills that can be utilized throughout one's medical career. Many medical schools showcase their organizations as a means of recruitment for incoming students. During the first- and, traditionally, second-year preclinical phase of training, students are engaged in organizations focused on service, advocacy, identity, wellness, career pursuits, or some combination of each. The University of Michigan Medical School boasts dozens of student organizations that range in mission and student involvement. The overwhelming majority of students participate in at least one, and often multiple, student organizations during this phase of medical school. This level of engagement has remained consistent over many years, including the last several years when the medical school underwent a major curriculum change: reducing the preclinical years (called the "Scientific Trunk") from two to one. As a result of this change, many student organizations were forced to undergo significant changes because continuity and leadership roles would need to change more rapidly with students having less available time to participate in these organizations.

Traditionally, organization leaders would stay on for at least two years and be able to slowly transition leadership roles over the course of their second year. With first- and second-year students sharing similar learning schedules and availability, it allowed for greater interaction between class years and more seamless changes in leadership positions. Starting with the Graduating Class of 2020, who matriculated in Fall 2016, the abbreviated preclinical year was incorporated into the curriculum. This class was the first to experience the challenges that resulted from passing on student organizations to first-year students after only one year as student-leaders. The issues that can result range from decreased continuity of projects to lower student participation in the organizations. With the Graduation Class of 2021, who matriculated in Fall 2017, there was an even shorter timeframe for the transition from first year (M1) to the clinical year; this only exacerbated the problem.

Due to personal involvement in multiple student organizations and facing these transition problems, the author decided to investigate the best practices for changing leadership in the context of this new curriculum. The goal was to create a guide for future student group leaders to utilize in order to maintain continuity of programming and increase program efficacy year-to-year. This framework can be applied to any group, but especially mission-based organizations.

Methods

In order to understand the situation regarding leadership transitions and formulate a clear and useable guide, the author determined that directly discussing transitions with current and former medical student organization leaders would provide a significant understanding of the situation. Student group leaders from a variety of organizations were informally and formally interviewed with standardized open-ended questions that addressed five areas of leadership transitions:

- 1) How was the leadership transition when you first joined the student organization?
- 2) How did you change the leadership transition process for your exit, and what factors influenced your strategy?
- 3) What aspects of the student organization do you believe were impacted by transition?
- 4) How did the new curriculum impact the transition?
- 5) What recommendations or strategies would be helpful for future leadership transitions?

Although the sample size was not sufficiently large and the nature of the open-ended questions did not make performing a statistical analysis feasible, the author was able to find trends in the responses that could be meaningfully used for developing a transition guide. In addition to these surveys, the author conducted a review of research on leadership transition in business and management journals. These articles were derived from sources such as the *Harvard Business Review*, consulting firms, such as McKinsey & Company, and leadership institutes. Finally, the author utilized personal experience working in leadership and conducting transitions in order to help formulate the guide for future student groups.

Also, to briefly define some terminology, the following subgroups referenced throughout this document are defined as the following: (1) current leaders are first-year and above students who actively hold leadership positions and primarily act in the transition process, (2) prior leaders include second-year and above student who are former student leaders who have the ability to become current leaders, and (3) new leaders are first-year students or, in rare instances, second-year and above students who have never held leadership positions in the organization referred to in the survey results. Using this standardized language, it will make it easier to refer to these three interconnected groups. Additionally, there are two primary recruitment and transition periods during the year: Fall and Spring. Fall refers to transitions between class year advancement or first-year matriculation (typically July through October) and Spring refers to mid-year transitions (typically from January through March).

Results

Several common themes became apparent through conversations with student leaders about transitions and the impact that the new curriculum had on changing leadership roles. Additionally, it was nearly universal that student organizations had thought about leadership transition, either due to challenges in the past or in response to the abbreviated curriculum. Those interviewed unequivocally noted disruption to their own onboarding from shortened recruitment periods, transitions occurring during the switch from preclinical to clinical year work, interrupted by first-year student concerns about time commitments due to unfamiliarity with medical school coursework, and, as one first-year leader stated, “losing the [upperclassmen] experienced leaders almost immediately after being selected to take over to the coming year.” They also noted that transitions were most successful for the primary leader roles, like director or president, but seemed less successful for supportive roles, such as treasurer or specific program coordinators. They also noted that confusion in new leaders often originated from a misunderstanding of the organization’s aims. This manifested in frequent messages from new to prior leaders about how to update “mission statements” and organization documents necessary for yearly renewal with the university.

While these issues were troubling for the student groups, some were unsure whether the transitions had a significant impact on the organization’s efficacy. Generally, there was a perception that programming would have been “smoother” or “more streamlined” if transitions were more effective. Unfortunately, most organizations did not have data on programming success or were uncomfortable assigning the degree to which successes or failures were a result of the quality of the leadership transition process. They did mention that new leaders that displayed “confusion” or reached out for help frequently in the first few months seemed to have less output and troubles initiating programs. In certain cases, organizations cited that because continuity of programming is essential to their success, especially to those they serve in the community, such as nonprofit organizations, that transitions were a vital component to their overall efficacy.

In terms of recommendations and strategies implemented to correct the issues listed previously, groups most commonly cited “ongoing support” from prior leadership team members. This support often included informal emails or text messages to the current leadership to see if they needed any assistance or advice, and often they were “genuinely curious” about how the organization was proceeding and requested information on their progress throughout the year. Additionally, some organizations attempted to change the time of recruitment to early summer, such as June or July, but all of the organizations

stated that the medical school requested that they not “overwhelm” incoming students and keep recruitment to late August and September, or for the Spring from January through March. A couple of student organizations utilize these multiple transition periods (Fall and Spring), with one noting a significant amount of success with maintaining the continuity of programming through this method. As a result, they were able to bring in more senior medical students, or Branches students who just completed Step 1 exams, with leadership experience to take over the organization during periods of leadership turnover and when they approached Fall recruitment. Other student groups did not attempt this method of springtime recruitment of seniors because of difficulty with finding interested students in taking on the leadership roles as well as the fact that they believed the M1, first year students, were capable leaders at this point and did not need any more assistance. The last comment that was noted by multiple leaders was the importance of “planning ahead” for transitions as many groups stated that they did not think about the process until one to two months before recruitment and onboarding was to occur.

Discussion

In reviewing the results and trends of these conversations, the author utilized best practice guides from the sources mentioned in the methods section to create a guide for future organizations. As noted in business surveys, successful leadership transitions lead to 90% higher likelihood of meeting short- and long-term performance goal and 13% lower attrition risk (Keller et al, 2020). Crafting a meaningful transition plan, whether perceived or not, can have a large impact on the experience of students and stakeholders in the organization.

In the survey results, onboarding is an essential part of the transition process but often is insufficient for helping new leadership fully understand their roles. Therefore, as noted in a management article, new leaders should have “onboarding journeys” rather than brief onboarding days (Hollister et al, 2019). One of the most impactful practice to help with that process is having the prior and new leadership partner in creating and implementing programming together. This combining of training and real-world utilization is referred in a business journal article as “decoupling reflection from real work” (Gurdjian et al, 2014). Additionally, during this period of onboarding and practice, reestablishing the mission and values of the organization helps to make new leaders more comfortable with guiding the organization (Keller et al, 2020).

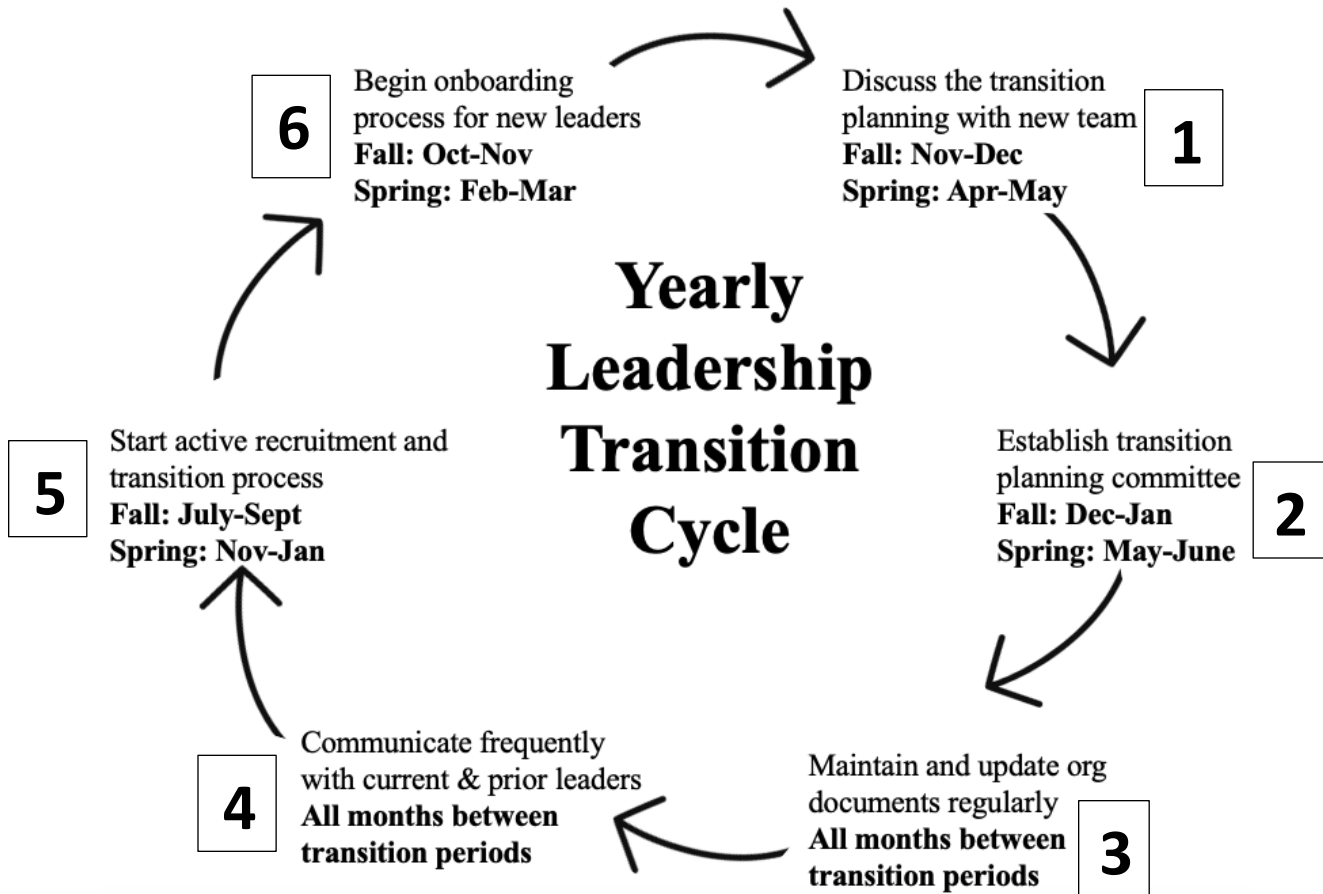
Important to the process of preparing for transitions is “starting early.” While some recommend starting the process of planning for the new group of leaders “as soon as their on-boarding is complete,”

at the very least it should start months ahead of the actual recruitment and onboarding period (Shekshnia et al, 2019). Creating a leadership role, or preferably, a committee on transitions is a well-utilized tool in the management space to prepare effectively for leadership exit and new leadership entrance (Rath et al, 2019). Having this committee meet frequently throughout the year is an effective way to keep every leader ready for the transition period. Also, constantly reviewing and revising organization documents and processes is essential for effective transition as it leads to less confusion and better long-term success (Yo-Jud Cheng, 2020).

Finally, one area that almost all groups would benefit from implementing is measures throughout the year of program outcomes. This is not just limited to the direct leadership transition process but also in programming throughout and between years. These measures will help leaders realize whether transitions were successful (Gurdjian et al, 2014).

Guide

- 1) Create expectations for transition early in new leadership term. Over the course of the year, the leadership team should be anticipating the transition to the new leaders; this means early planning and keeping transition in the back of one's mind.
- 2) Establish a committee specifically tasked with transition planning. This committee will be in charge of creating, developing, and/or maintaining organization documents and guides throughout the year as well as the onboarding process for new leaders.
- 3) Maintain and update organization documents and materials for next group of leaders. While the transition committee is in charge of these materials, each leader must regularly update these documents to avoid confusion when the transition nears.
- 4) Communicate frequently with current & prior leaders; look for support from willing groups. Regular check-ins with the prior leadership was shown to be very helpful to the new leaders, even after months in the role. Reach out to other organizations for guidance as well.
- 5) Set and stick to benchmark dates for achieving goals of transition set by transition committee. These benchmarks should be updated and revisited regularly, as should organization mission and values. The culture of the organization is often the most challenging but also most sustaining aspect of any organization.
- 6) Begin onboarding process for new leaders continued with ongoing support. The prior leadership team should be aware that they will be a necessary aspect of maintaining the organization over time.



Sample Transition Planning Calendar

<p style="text-align: center;">September</p> <ul style="list-style-type: none"> • Fall: Recruitment and transition process formally begins • Spring: Prior leadership should have all transition documents ready and organized in shareable online folder • Both: Actively discuss transition process and perform group check-in 	<p style="text-align: center;">October</p> <ul style="list-style-type: none"> • Fall: New leaders selected + begin onboarding; create leadership transition committee • Spring: Transition committee should hold a monthly meeting in order to discuss • Both: Perform group check-in to make sure everyone is invested 	<p style="text-align: center;">November</p> <ul style="list-style-type: none"> • Fall: Send email to prior leadership team members to assistance • Spring: Start finalizing recruitment timeline and documents needed for transition process • Both: Review culture and expectations are clear 	<p style="text-align: center;">December</p> <ul style="list-style-type: none"> • Fall: Hold first meeting of transition team and create benchmarks for the new year + how to measure outcomes • Spring: Start sending out recruitment documents and hold transition meeting to finalize onboarding process 	<p style="text-align: center;">January</p> <ul style="list-style-type: none"> • Fall: Following break period, leaders should have a formal check-in with their leadership team • Spring: Begin formal review and interview process for new leaders + prior leaders interested in returning 	<p style="text-align: center;">February</p> <ul style="list-style-type: none"> • Fall: Leadership team should check-in on organization documents, especially regarding transition • Spring: Continue interview process for applicants; be sure to clearly convey organization culture and values <u>at this time</u>
<p style="text-align: center;">March</p> <ul style="list-style-type: none"> • Fall: Hold a meeting of the leadership transition committee to set benchmarks • Spring: New leaders selected + begin onboarding; create leadership transition committee 	<p style="text-align: center;">April</p> <ul style="list-style-type: none"> • Fall: Start finalizing recruitment timeline and documents needed for transition process • Spring: Send email to prior leadership team members to assistance • Both: Review culture and expectations are clear 	<p style="text-align: center;">May</p> <ul style="list-style-type: none"> • Both: <i>Major programs likely occurring in May or June</i> • This is a busy time for organizations, but transition teams should still try to meet once this month 	<p style="text-align: center;">June</p> <ul style="list-style-type: none"> • Both: <i>Major programs likely occurring in May or June</i> • This is a busy time for organizations, but transition teams should still try to meet once this month 	<p style="text-align: center;">July</p> <ul style="list-style-type: none"> • Both: Perform review of previous year's org performance • Fall: Start sending out recruitment documents and hold transition meeting • Spring: Hold a meeting of the leadership transition committee to set benchmarks 	<p style="text-align: center;">August</p> <ul style="list-style-type: none"> • Fall: Start sending out recruitment documents and hold transition meeting to finalize onboarding process • Spring: Hold transition committee meeting to discuss benchmarks and onboarding planning

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