

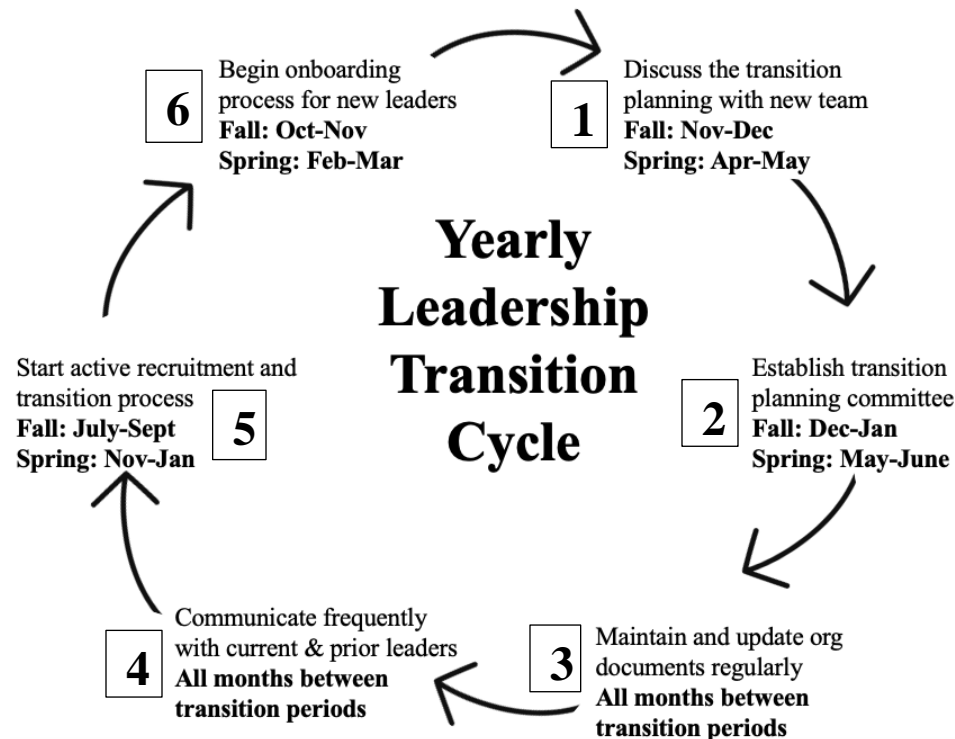
# Building Successful Medical Student Organizations by Optimizing Leadership Transitions

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## Capstone Executive Summary

Leadership transition is not only essential to the continuity of the organizations themselves but to the continuity of programming and values that make them a significant part of a student's experience. More apparent in service-based organizations, but also seen in other types of groups, the continuity of these programs also has an effect on the people and communities that these groups serve. Therefore, leadership transitions must be a major part of every leadership team's long-term planning. Throughout the analysis of medical student organization transitions, especially with consideration to the one-year preclinical curriculum, several factors were commonly cited as helpful in making transitions as seamless as possible.



- 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 were reported as 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 combined with ongoing support. The prior leadership team should be aware that they will be a necessary aspect of maintaining the organization over time. Onboarding is most effective when it is organized, focused, and continued weeks to months after the formal transition period.

## Sample Transition Planning Calendar

<h3>September</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Recruitment and transition process formally begins</li> <li>• <b>Spring:</b> Prior leadership should have all transition documents ready and organized in shareable online folder</li> <li>• <b>Both:</b> Actively discuss transition process and perform group check-in</li> </ul>	<h3>October</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> New leaders selected + begin onboarding; create leadership transition committee</li> <li>• <b>Spring:</b> Transition committee should hold a monthly meeting in order to discuss</li> <li>• <b>Both:</b> Perform group check-in to make sure everyone is invested</li> </ul>	<h3>November</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Send email to prior leadership team members to assistance</li> <li>• <b>Spring:</b> Start finalizing recruitment timeline and documents needed for transition process</li> <li>• <b>Both:</b> Review culture and expectations are clear</li> </ul>	<h3>December</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Hold first meeting of transition team and create benchmarks for the new year + how to measure outcomes</li> <li>• <b>Spring:</b> Start sending out recruitment documents and hold transition meeting to finalize onboarding process</li> </ul>	<h3>January</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Following break period, leaders should have a formal check-in with their leadership team</li> <li>• <b>Spring:</b> Begin formal review and interview process for new leaders + prior leaders interested in returning</li> </ul>	<h3>February</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Leadership team should check-in on organization documents, especially regarding transition</li> <li>• <b>Spring:</b> Continue interview process for applicants; be sure to clearly convey organization culture and values <u>at this time</u></li> </ul>
<h3>March</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Hold a meeting of the leadership transition committee to set benchmarks</li> <li>• <b>Spring:</b> New leaders selected + begin onboarding; create leadership transition committee</li> </ul>	<h3>April</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Start finalizing recruitment timeline and documents needed for transition process</li> <li>• <b>Spring:</b> Send email to prior leadership team members to assistance</li> <li>• <b>Both:</b> Review culture and expectations are clear</li> </ul>	<h3>May</h3> <ul style="list-style-type: none"> <li>• <b>Both:</b> <i>Major programs likely occurring in May or June</i></li> <li>• This is a busy time for organizations, but transition teams should still try to meet once this month</li> </ul>	<h3>June</h3> <ul style="list-style-type: none"> <li>• <b>Both:</b> <i>Major programs likely occurring in May or June</i></li> <li>• This is a busy time for organizations, but transition teams should still try to meet once this month</li> </ul>	<h3>July</h3> <ul style="list-style-type: none"> <li>• <b>Both:</b> Perform review of previous year's org performance</li> <li>• <b>Fall:</b> Start sending out recruitment documents and hold transition meeting</li> <li>• <b>Spring:</b> Hold a meeting of the leadership transition committee to set benchmarks</li> </ul>	<h3>August</h3> <ul style="list-style-type: none"> <li>• <b>Fall:</b> Start sending out recruitment documents and hold transition meeting to finalize onboarding process</li> <li>• <b>Spring:</b> Hold transition committee meeting to discuss benchmarks and onboarding planning</li> </ul>

Utilize this sample calendar to help guide when informal and formal transition planning was most effectively incorporated into student organization schedules. Of note, a good portion of the work of transition does not occur in the transition committee meetings, which is by design. The transition committee is mostly for finalizing and running the onboarding meetings, although still essential to long-term planning as well. The most impactful work of transition occurs through regular communication with current and prior leaders, reestablishing and reiterating the goals and values of the organization, and analyzing the performance over the year through qualitative and quantitative metrics in order to make the following year even more effective than the last.