

May 31, 2022  
1-2 pm

# AMICCCUS 101: Transition Planning

Discussing the importance of Executive transitions in student organizations

# Transition Planning

## *Agenda*

- 11 reasons why transitions should be done well
- Fundamentals and examples
- Question to consider and discuss
- Wrap up

*“When kids act up in school, they are not getting what they need.”*

—

***Are adults any different?  
Employees?  
Board members?***

—

***Give them what they need  
to be successful.***

Dr. Jody Carrington



# Why board transitions should be done well

1. Establish a functional team.
2. Prepare them for duty
3. Seize an organizational growth opportunity
4. Positively affect tone & culture
5. Make a great first impression
6. Improve board recruitment
7. Pass on collective & curated knowledge
8. Avoid the firehose
9. Screen for commitment
10. Attract quality with quality
11. Bonus reason: Job security



# Transition fundamentals

## Key ingredients to good executive changeovers

### Positive Environment & Growth Mindset Culture

- Fertile ground for learning, growth, innovation & planning
- Reduce/eliminate sources of stress
  - Fear, ego, frustration, lack of confidence, perfectionism, overwhelmed, feeling alone, etc.

# Transition fundamentals

## Key ingredients to good executive changeovers

### Role Clarity, Role Clarity, & Role Clarity.

- Everyone in the organization knows...
  - What their role is and how they contribute to the mission
  - What their role **is not**, and why it's important to stay in their lane (not step on toes)

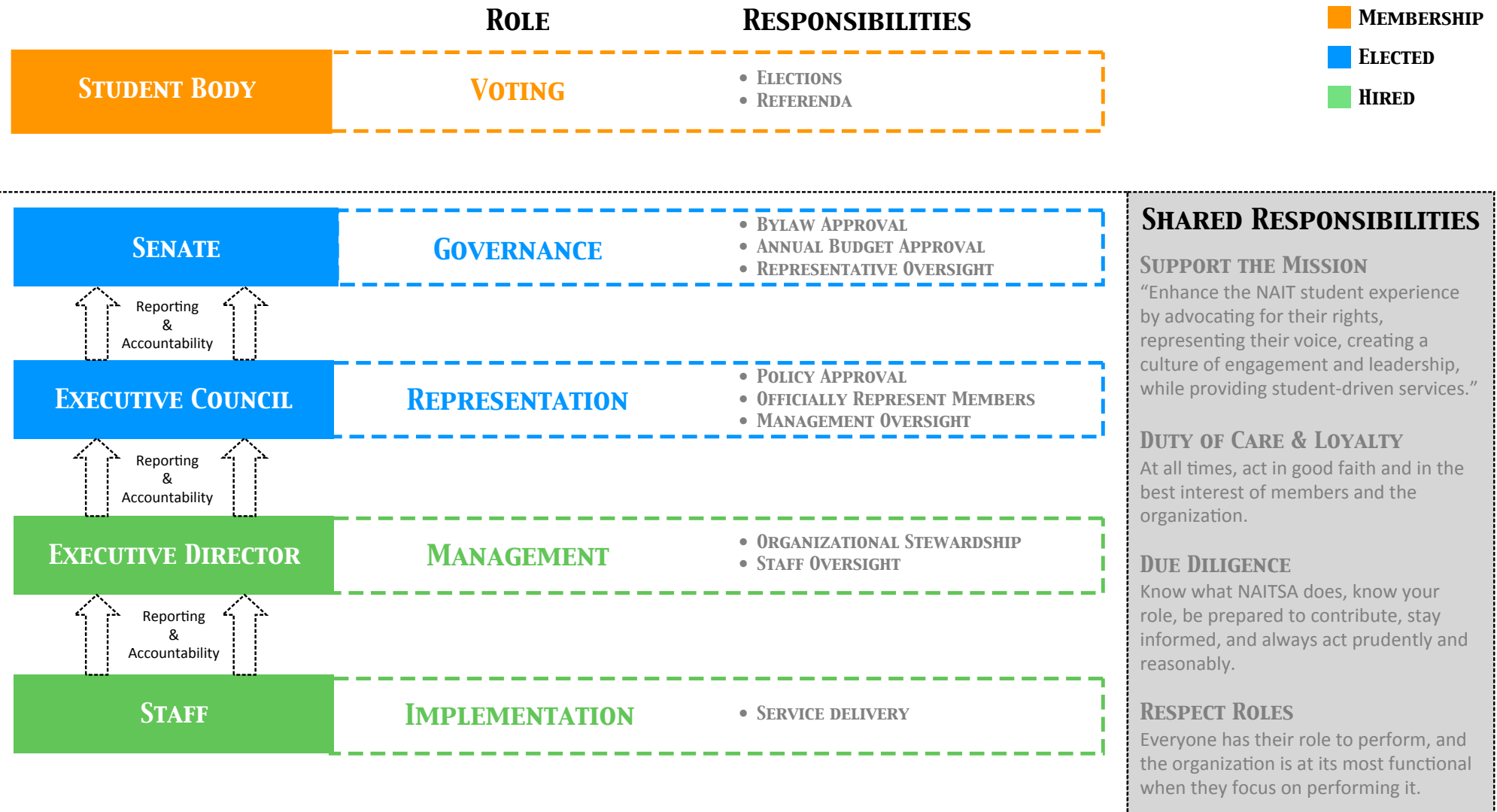
# Transition fundamentals

## Key ingredients to good executive changeovers

### Honest Advertising

- Be crystal clear about what the job is and isn't, before nominations close.
- Here's what we cover at NAITSA:
  - Position info including role, benefits/perks, limitations
  - How NAITSA works (roles and reporting structure)
  - How to be successful as an Executive
  - Fiduciary duty
  - Nomination & campaign tips
  - What to expect if you win your election

# NAITSA - Roles & Accountability Structure



## SHARED RESPONSIBILITIES

**SUPPORT THE MISSION**  
 “Enhance the NAIT student experience by advocating for their rights, representing their voice, creating a culture of engagement and leadership, while providing student-driven services.”

**DUTY OF CARE & LOYALTY**  
 At all times, act in good faith and in the best interest of members and the organization.

**DUE DILIGENCE**  
 Know what NAITSA does, know your role, be prepared to contribute, stay informed, and always act prudently and reasonably.

**RESPECT ROLES**  
 Everyone has their role to perform, and the organization is at its most functional when they focus on performing it.



# Transition fundamentals

## Key ingredients to good executive changeovers

### Honest Advertising

- Be crystal clear about what the job is and isn't, before nominations close.
- Here's what we cover at NAITSA:
  - Position info including role, benefits/perks, limitations
  - How NAITSA works (roles and reporting structure)
  - How to be successful as an Executive
  - Fiduciary duty
  - Nomination & campaign tips
  - What to expect if you win your election

# Key Traits for Success on Executive Council

- ❖ Eagerness to learn and grow
- ❖ Desire to develop your executive presence
- ❖ Passion for helping all students
- ❖ Ability to remain non-partisan
- ❖ Contributing team member
- ❖ Emotional balance (thinking/feeling brain)
- ❖ Skilled communicator
- ❖ Integrity and accountability
- ❖ Empathy and perspective
- ❖ Humility and self-awareness
- ❖ Inspirational positivity and confidence



# Collect and share testimonials

## GILLIAN BILODEAU

VP Student Services 2014-15

"[Being a NAITSA Executive Council member] It's like having an entire student population being your boss. There's a lot of responsibility to make sure you're fulfilling your promises but also help bring things to the table that maybe they didn't even know they wanted at the end of the day. It's an experience that will benefit you throughout your entire career, you'll take pieces of what you've learned and carry that through your entire life."



## JUSTIN NAND

President 2015-16 | VP External 2014-15

"If you want to help students, run for NAITSA Executive Council. They'll train you, and they'll make sure that you do the best job you can do for the students. All we need is students that want to help people, and the rest will be taken care of."



naitsa NAITSA Student Executive Council Vignettes - J...



## JOHN PEROZOK

President 2016-17

"I learned how to network, how to work with the government, how to deal with high stress. (...) It was awesome because it wasn't easy, it was uncomfortable for me. I learned so much about myself. My strengths, my weaknesses, and what I need to work on to be successful in the workplace going forward. It's something that change my life entirely, and the way I think about everything."

naitsa NAITSA Student Executive Council Vignettes - J...



## JONATHAN BILODEAU

President 2013-14 | VP Student Services 2012-13

"For whoever take those roles, it'll completely redefine their lives. It'll force them to search inside themselves, dig as deep as they can, and really expose their character for who they are, because that's what the job is. The job is defining yourself, and defining yourself in service to others."

# Transition fundamentals

## Key ingredients to good executive changeovers

### Honest Advertising

- Be crystal clear about what the job is and isn't, before nominations close.
- Here's what we cover at NAITSA:
  - Position info including role, benefits/perks, limitations
  - How NAITSA works (roles and reporting structure)
  - How to be successful as an Executive
  - Fiduciary duty
  - Nomination & campaign tips
  - What to expect if you win your election

# Transition fundamentals

## Key ingredients to good executive changeovers

### PURPOSE, PRIORITIES, & APPROACH (© Kesa Inc.)

- These three team elements make up the bulk of our initial team building retreat (i.e. the WHY, WHAT, and HOW of the team.)
- 4 questions of purpose starts the team on **common ground**:
  1. Who do we serve?
  2. What do they need from us?
  3. How do we add value as a team?
  4. What would make us extraordinary?
- Purpose without priorities is just hope; What real work will the team do?
- Agreeing on a shared approach —> How will we work together?

# Transition fundamentals

## Key ingredients to good executive changeovers

### GMs & EDs — Be a Helpful “Guide on the Side”?

- What is your currently defined role in transition?
  - Organizer? Facilitator? Spectator? Not involved?
- Every organization needs its own unique process
  - No one-size-fits-all
  - Complex systems evolve from simple ones; Fine tune over time
  - Steal ideas here (at AMICCUS-C)



# Discussion Question:

What is currently the **most valuable part** of your transition process that, for the good of your organization, must be preserved at all costs?

**WHY?**

# Wrapping up

## Session takeaways

- Transitions are important to do well and valuable in many ways
- Take stock of your current process; enhance what works and improve over time
- Final tips:
  - Avoid “we’ve tried that before and it didn’t work”
  - Expand your timeline as much as possible; more time the better
  - Consider a third party facilitator if budget allows
- Chris Chelmick — [chrisc@nait.ca](mailto:chrisc@nait.ca)



May 31, 2022  
1-2 pm

# AMICCCUS 101: Transition Planning

Discussing the importance of Executive transitions in student organizations