



Consulting & Independent Contracting SIG Transition Plan

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Background

This Transition Plan was created to help ensure the orderly transition of responsibilities, management oversight, and activities from current Consulting & Independent Contracting SIG (CIC SIG) officers to their successors.

Document Purpose

The purpose of this document is to provide a comprehensive framework for actions that support the implementation of our transition plan.

Related Documents

Please see also the following:

- CIC SIG Succession Plan
- CIC SIG Election Process
- CIC SIG Volunteer Positions
- CIC SIG Rechartering & Strategic Plan¹

1. This document includes mission statement, goals and objectives, strategies, and activities.

Plan Objective

The primary objective of our transition planning program is to ensure incoming SIG officers and committee managers benefit fully from the experience and ongoing guidance of their predecessors as they assume their new roles and responsibilities.

Philosophy

Primary responsibility for a smooth transition of managerial responsibilities resides initially with the outgoing CIC SIG officers and committee managers and then, over a defined period of time, migrates to the incoming officers and managers who are replacing them.

Procedure

Planning and executing a smooth transition of officers is a three-step process.

Plan for succession

To ensure a smooth transition, each SIG officer or committee manager plans for his or her succession, beginning early in the term of office, identifying and grooming a potential successor.²

After the election, the Nominating Committee will send the names of the incoming officers and committee managers to the:

- CIC SIG Webmaster to post on the Web site and update the History page
- STC [Membership](#) manager at headquarters

Handoff tasks and responsibilities

Each SIG officer or committee manager hands off tasks and responsibilities to his or her successor. Since the circumstances of this handoff will vary, two alternatives and multiple media are offered for this process. The general time frame for the transition runs from the election of new officers to the beginning of the new STC community year on July 1.

2. For details, see the CIC SIG Succession Plan.

Alternative 1 If both the SIG officer or committee manager and the successor attend the annual STC conference, they should meet to initiate the transition process, exchange materials, and follow-up via e-mail and telephone exchanges.

Alternative 2 If one or both of the two do not attend the annual STC conference, the handoff should begin at a physical meeting, if feasible; If not, they should communicate via telephone and follow-up using e-mail and telephone exchanges.

Mentoring

An ongoing mentoring relationship between SIG officers, committee members and their successors, offers the predecessors' oversight and assistance as required during the first three months the new leaders are in office, by availability thereafter in an advisory role. The particulars of the mentoring vary with the office. Here are some examples (meant as guidelines, not prescriptions):

SIG Manager The outgoing manager guides the incoming manager through start-up activities for the next community year; in particular, the summer Board report. The incoming SIG manager should:

- Make arrangements for a planning meeting to discuss activities for the upcoming year. (This meeting should occur during the summer.)
- Start a folder with hard-copy documents for the Community Achievement Award.

Assistant SIG Manager The outgoing assistant manager might be the new manager, in which case the "transition" is moot. Otherwise, the outgoing assistant SIG manager guides the incoming assistant SIG manager over the same time frame as the outgoing SIG manager orients his or her successor.

Secretary The outgoing secretary hands off the secretarial administrative archives and templates (if any) to the incoming secretary. maintains oversight through the summer Board report (including establishment of the budget for the new community year).

Treasurer In addition to handling off the budget and financial records, the outgoing treasurer retains responsibility for filing the SIG's annual financial report and income tax return (if required). The outgoing treasurer should:

- Help the incoming treasurer prepare the budget for the new community year
- Coordinate the necessary changes to stewardship of the community's financial accounts—for example, new bank account signature cards, updating

account contact information for such services as conference calling, changing ownership of CIC SIG PayPal accounts, etc.

Web Site Administrator	The outgoing Web site administrator walks the incoming administrator through the procedures for maintaining and expanding the site and retains administrative access for the first year as a back-up should the new administrator be unavailable or require assistance to handle a work surge.
E-mail List Manager	The outgoing E-mail List manager walks the incoming manager through the procedures for maintaining subscriptions, monitoring discussions, and ensuring professional etiquette is observed. He or she retains administrative access for the first year as a backup should the new manager be unavailable. The outgoing manager continues to monitor the list periodically for the first three months of the incoming manager's term.
Membership Manager	The outgoing membership manager passes along the SIG directory, the online new member orientation package, and orients the incoming membership manager on the process for welcoming new members each month, pairing them with SIG members who have similar interests and areas of expertise, and encouraging them to be active.

Measuring Success

1. At the end of each community year, SIG officers reflect upon whether they had sufficient guidance from their predecessors.
2. In cases where the guidance was considered insufficient, the officer in question seeks to improve the transition for his or her successor.
3. In passing the leadership "baton," the ultimate measure of success is whether the CIC SIG continues to meet its goals and objectives.