

Transitioning Leadership in Federal Agencies to Reduce Conflict and Maintain Local Relationships

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Objectives

- Provide history of the newly adopted Forest Service transition management process.
- Explore examples of current “Handover Memos” being used in the Forest Service.
- Through roundtable discussion, critique the transition management process and discuss potential for improvements and increased use.

Collaboration Action Team

The Collaboration Action Team (CAT) was created to serve as a consultative group on collaboration, operating strategically to influence issues of collaborative capacity across federal agencies, non-governmental organizations and the communities they serve.

Collaboration Action Team (CAT)

Long-standing Issue:

Frequent turnover of federal
agency leaders

Tool: “Handover Memo”

The purpose of a “Handover Memo” is to help communicate formal and informal agreements and commitments, not only between the departing leader and the new leader, but also to inform and involve agency staff and superiors.

Handover Memo Template

- **To:** Address memo to the new agency unit leader and any interim leaders.
- **From:** Completed by the outgoing leader prior to departure. At a minimum, memo should be developed with the participation of your primary staff.
- **cc:** At a minimum, the letter should be copied to the primary staff and supervisor.

Handover Memo Template

The memorandum should cover the following four areas:

- A description of the current partnership and collaborative efforts underway on the unit
- Commitments or schedules associated with current partnership and collaborative efforts
- Current working agreements or procedures
- Strategy for meeting and getting to know the community

Forest Service Leadership Transition Process

“Our ability to solve natural resource related problems over the long run depends on the quality of long-term relationships between agencies, other organizations and the public.”

Chief Dale Bosworth, July 2006

Example of a Handover Memo

From: Paul Brewster, out-going Forest Supervisor of the Green Mountain and Finger Lakes NF

To: Meg Mitchell, in-coming Forest Supervisor of the Green Mountain and Finger Lakes NF

Incorporating Hand-off Into a Leadership Transition

- Have a transition plan that involves people the new leader will be working with
 - Agency staff & current leadership team
 - Key stakeholders
- Think about actions that need to take place before arrival
 - Handoff: Joint Congressional visit, meetings with previous leader and “acting”

- Other actions before arrival...
 - Introductory phone calls or letters to key stakeholders and partners
 - Introductory letter to employees
 - News release
 - Briefing papers on key issues & programs
- Day One... meeting employees
- First 45 Days... getting to know people
- Within first 4 months
 - Strategic agenda, communication & “early wins”

Example of a Handover Memo

From: Pete Karp, outgoing Forest Supervisor,
Uinta NF

To: Dan Dallas, Acting Forest Supervisor and
the yet-to-be selected Forest Supervisor,
Uinta NF

Roundtable Discussion

At your table, please discuss the current transition management process, then:

- Develop a set of recommendations for improving the process, and
- Identify strategies for increasing the use “Handover Memos.”

One participant from each roundtable will present their group’s recommendations to the whole group.