

Transferring Meeting Leadership

Using recurring meetings to develop judgment, authority, and follow-through

Purpose

Help an incoming leader assume responsibility for a recurring meeting through a bounded trial. Clarify roles, decision boundaries, and practical arrangements for useful decisions and follow-through.

1. Define the handoff

Meeting / purpose	What does the meeting need to accomplish, and what works well now?
Incoming chair	What will the chair own before, during, and after the meeting? What support is needed?
Incumbent / authority	How will the incumbent participate? Who decides, recommends, consults, or approves? What limits apply?
Process support	Who maintains the agenda, decision record, action list, and follow-up?
Trial / review	Which practices will be tested? Who owns the trial, and when will it be reviewed?

2. Run the exercise

- **Examine current practice**
Ask participants what the meeting needs to accomplish, what works well, and where greater clarity would help.
- **Agree on roles and boundaries**
Confirm the incoming leader's interest, chair responsibilities, the incumbent's contribution, authority boundaries, and support.
- **Select a small trial**
Offer candidate practices, including clear agenda outcomes, decision records, and action ownership. Select two or three to try.
- **Prepare and run the meeting**
The incoming chair leads preparation and discussion. The incumbent contributes within the agreed role; support staff maintain the record.
- **Review and adjust**
Examine the results, how the roles worked, and what the chair learned. Agree on the next trial and any changes in responsibility.

3. Extract the leadership implications

- What did the incoming chair learn about preparation, discussion, judgment, and follow-through?
- Where did the incumbent's contribution help, and what capabilities or boundaries need further development?
- What should the next meeting provide an opportunity to practice, and how will progress be reviewed?

What this produces

A working handoff agreement, selected meeting practices, and a reviewable opportunity to develop leadership capability and improve follow-through.

Facilitator note

Treat the trial as a learning opportunity. Do not presume a future title or deficiencies in current practice. Distinguish meeting leadership from decision authority, and use the lightest record that supports the work.