

HOW-TO GUIDE

# CHAPTER LEADER TRANSITION

It is important for chapters to find a time within the first month of elections for a transition meeting with the incoming and outgoing boards. At this meeting, past and future business should be discussed along with goals for the year. These goals should incorporate visions of both the new and old boards. Some chapters look at goals for the entire board collectively, and others address them position by position. This is also a good time for leaders to break into groups based on position (e.g. new president meets with immediate past president).

Past board members should provide materials to new members using a flash drive, Google drive and/or hard copies. This information should include position descriptions, timelines, contact information, debrief forms from events and vendor information, budget information, etc., and will vary by position. Instruct new board members to keep detailed accounts of what they do and the contacts they make throughout the year to pass on at the end of their term.

Another option for a transition meeting is a leadership retreat. ASDA created an additional how-to guide on organizing a [Chapter Leadership Retreat](#) to facilitate the change of leadership and prepare the new leaders for their role. This guide includes a suggested outline, resources and templates to help plan the event.

### **Leadership Transition Checklist**

Use this checklist as a reference when planning the meetings to transition your chapter leaders.

#### Meeting preparation:

- Each board member should compile a position-specific list of important contacts and information for events.
  - Past or current president should provide the [Chapter Handbook](#) to new chapter leaders.
- Immediate past president develops and sends out an agenda to all participants. Consider inviting the faculty advisor(s).

#### Meeting with the outgoing and incoming boards:

- Discuss unfinished business.
- Describe goals that were accomplished over the last year.
- Set goals for the upcoming year based on what was put in place previously.
- Introduce the faculty advisor and allow them to address the group and explain their role.
- Incoming members agree and sign a position contract (*Attachment A*).
- Review and highlight sections of the Chapter Handbook. Encourage leaders to reference sections most relevant to their roles.
- Discuss the event debrief form to be filled out after all events including advocacy events, social events, outreach events, meeting travel and lunch & learns, etc. (*Attachment B*).
- Individual committee position meetings (communications, fundraising, events, etc.).
- Give Google Drive information or binder/flash drive to the incoming members that contains the following: constitution and bylaws, affiliation agreement, position description, contacts, debrief forms, and event information and templates.

Meeting to continue with new board only:

- Develop a “calendar-at-a-glance” with annual events (*Attachment C*) and incorporate [national events and deadlines](#).
- Create a monthly timeline for each position.
  - Example: within first month of elections, second month after elections, etc.
- Set board and general meeting dates for the year.
- Set goals as a board and for each position.

## Attachment A – Position Contract

### \_\_\_\_\_ Committee Contract/Responsibilities

**Executive Council Member to Oversee Committee:**

**Committee Duties/Description:**

**Additional Responsibilities:**

- All monthly ASDA (general) meetings are mandatory. (Typically first Tuesday of every month.)
- All committee chairs must have monthly meetings prior to ASDA general monthly meeting in order to provide update/progress on upcoming events and projects.
- All members of committee must be included in meetings with an email sent to the president, VP, and EC member overseeing committee.
- All emails must CC the executive committee.
- Executive committee member will be checking in on progress/updates before each monthly meeting. Each meeting must have any update, whether progress, actual details for event or information for the committee/membership.
- Core ASDA events (annual events) and Gold Crown Award goal events must be planned/scheduled or executed by awards deadline of a given year.

**CORE ASDA Events:**

I, \_\_\_\_\_, agree to the above and am committing to be capable and informed enough to perform the responsibilities stated in this contract. I understand that I will be held responsible for these duties as \_\_\_\_\_ Chair / Co Chair. I have noted the ASDA 'At a Glance' Calendar and know when my annual events are held and commit to keeping to those dates. I also understand that meeting attendance is mandatory, and if I do not have an excused absence, I can be required to volunteer at additional events or be at the risk of being removed from my position officially. I understand that I am representing [chapter name] Chapter and the American Student Dental Association, and my behavior and professionalism in ASDA will reflect this to the best of my ability.

Signed: \_\_\_\_\_

Position: \_\_\_\_\_

Date: \_\_\_\_\_

President: \_\_\_\_\_

Vice President: \_\_\_\_\_

Executive Committee Member: \_\_\_\_\_

**Attachment B – ASDA Debrief Form**

**Name of Event:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Brief Description:**

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**Expenses (break down as much as possible):**

**Profits:**

**Notes for next year (what was great, what could be changed, etc.):**

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**Timeline and Contacts (When did you start planning the event and other pertinent dates?  
Who were your contacts, if any - name/email/phone?):**

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*\*Note where to save debrief, such as Google Drive or Flash Drive.*

**Attachment C – Sample Calendar at a Glance**

<b>JAN</b>	<b>FEB</b>	<b>MARCH</b>	<b>APRIL</b>
<b>MAY</b>	<b>JUNE</b>	<b>JULY</b>	<b>AUGUST</b>
<b>SEPT</b>	<b>OCT</b>	<b>NOV</b>	<b>DEC</b>