

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 binders (supplied by the ASDA chapter) containing hard copies. Most chapters use a hybrid. This information should include position descriptions, timelines, contact information, debrief forms from events and vendor information, budget information, etc., and will vary by position. The new board members should be instructed 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 another 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 ADPAC drives, social events, outreach events, meeting travel and lunch & learns, etc. (*Attachment B*).
- Individual committee position meetings (communications, fundraising, events, etc.).
- Give a binder and/or flash drive to the incoming members that contains the following: 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 2021-22 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 council 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 council/membership.
- Core ASDA events (annual events) and Gold Crown Award goal events must be planned/scheduled or executed before January 1, 2022.

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 _____ Lead 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 Council Member: _____

Attachment B – ASDA Debrief Form

Name of Event: _____

Date: _____

Brief Description:

Expenses (break down as much as possible):

Profits:

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

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

Please save a hard copy for binder and save file to computer

Attachment C – Sample Calendar at a Glance

JAN	FEB	MARCH	APRIL
MAY	JUNE	JULY	AUGUST
SEPT	OCT	NOV	DEC