HOW-TO GUIDE

CHAPTER LEADER TRANSITION

ASDA
American Student Dental Association
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. Download the guide at www.ASDAnet.org/how-to.

**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 at [www.ASDAnet.org/how-to](http://www.ASDAnet.org/how-to) for 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 at www.ASDAnet.org/index/programs-events/dates-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 2017-18 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, 2018.

CORE ASDA Events:
In addition to those listed, please refer to copy of Gold Crown application from 2017 to see past events.

Gold Crown ASDA Goal 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

<table>
<thead>
<tr>
<th>JAN</th>
<th>FEB</th>
<th>MARCH</th>
<th>APRIL</th>
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| ■ Newsletter 3  
■ Gold Crown app due  
■ District Meeting | ■ Annual Session  
■ Predental event for bracket challenge  
■ GKAS | ■ Dental ball – faculty awards, full dinner more budget  
■ Newsletter 4  
■ State lobby day  
■ Vendor fair 2 (big fair)  
■ ASDA Bracket Challenge | ■ Golf scramble  
■ End of year event (transitions)  
■ ADA Dentist and Student Lobby Day |

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<tr>
<th>MAY</th>
<th>JUNE</th>
<th>JULY</th>
<th>AUGUST</th>
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| ■ Transitions new officers  
■ End of year events | ■ Back to school event (BBQ/jump house family day)  
■ ADPAC white coat event signup  
■ Scrub sale (ongoing) must promote to incoming D1s  
■ D1 ASDA 101 | ■ Newsletter 1st issue feature D1s and first year experiences | |

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<tr>
<th>SEPT</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
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| ■ Wellness activities for Wellness Month  
■ TAILGATE AT ASU - something new needed this year to add to it  
■ All chapter meeting  
■ Process members with ASDA central office  
■ Basketball tournament-fundraiser | ■ Predent workshop for Predental Month  
■ Leadership retreat  
■ Retreat planning committee formed  
■ Vendor fair 1  
■ ADPAC raffle for tickets | ■ ASDOH clothing sale before holiday  
■ Newsletter 2  
■ Gold Crown ASDA app (work on Nov-Dec)  
■ National Leadership Conference  
■ Advocacy event for Advocacy Month | ■ Operation Christmas child  
■ Talent show  
■ Class dance competition one class gets award from faculty  
■ Oral B X-mas gift sale to ATSU  
■ Oral B lunch and learn free toothbrushes |