

HOW-TO GUIDE

CHAPTER LEADER TRANSITION

How-to Guide: Leadership Transitions

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 divide 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 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 roles. 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.

Committee Follow-Ups

Hold quarterly follow-up meetings with the president, president elect, treasurer and each committee to monitor progress on goals, budget, etc. It is important to monitor your progress on goals to achieve them.

Attachment A – Position Contract

_____ **Committee Contract/Responsibilities**

Executive Council Member to Oversee Committee:

Committee Duties/Description:

Additional Responsibilities:

- All monthly 2018-19 ASDA (general) meetings are mandatory. (Typically first Tuesday of every month.)
- All committee chairs must have monthly meetings prior to the 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 the committee.
- All emails must copy the executive committee.
- The Executive council member will be checking in on progress/updates before each monthly meeting. Each meeting must have all updates, 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, 2019.

CORE ASDA Events:

In addition to those listed, refer to the copy of Gold Crown applications from 2018 to see past 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

<p>JAN</p> <ul style="list-style-type: none"> ■ Newsletter 3 ■ Gold Crown app due ■ Outreach event for National Week of Service ■ District Meeting 	<p>FEB</p> <ul style="list-style-type: none"> ■ Annual Session ■ Predental event ■ GKAS 	<p>MARCH</p> <ul style="list-style-type: none"> ■ Dental ball – faculty awards, full dinner more budget ■ Newsletter 4 ■ State lobby day ■ Vendor fair 2 (big fair) 	<p>APRIL</p> <ul style="list-style-type: none"> ■ Golf scramble ■ End of year event (transitions) ■ ADA Dentist and Student Lobby Day
<p>MAY</p> <ul style="list-style-type: none"> ■ Transition new officers ■ End of year events 	<p>JUNE</p>	<p>JULY</p> <ul style="list-style-type: none"> ■ 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 	<p>AUGUST</p> <ul style="list-style-type: none"> ■ Newsletter 1st issue feature D1s and first year experiences
<p>SEPT</p> <ul style="list-style-type: none"> ■ 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 	<p>OCT</p> <ul style="list-style-type: none"> ■ Pre-dent workshop for Predental Month ■ Leadership retreat ■ Retreat planning committee formed ■ Vendor fair 1 ADPAC raffle for tickets 	<p>NOV</p> <ul style="list-style-type: none"> ■ ASDOH clothing sale before holiday ■ Newsletter 2 ■ Gold Crown ASDA app (work on Nov-Dec) ■ National Leadership Conference ■ Advocacy event for Advocacy Month 	<p>DEC</p> <ul style="list-style-type: none"> ■ 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