**TRANSITION PLAN OVERVIEW**

While the transition plan at each chapter will be unique, there are key aspects that should always be observed. To smooth out the transition process, each Executive Board Member should keep a binder or flash drive of frequently used materials and information. In addition to the concrete information (such as resources, contacts, important campus policies, etc.) inside the binder, it is a good idea to include recommendations and suggestions for the incoming board member to consider.

For each board position a minimum of three meetings should be held with each of the following: Student President or Vice President; Outgoing Board Member; Incoming Board Member.

# Meeting One Agenda Points

*Tip: Transition of power can be awkward, acknowledge this upfront to allow each person the space to be respectfully open and honest about his/her questions and concerns.*

1. Review purpose, responsibilities and expectations of the position, and committee (when applicable).
2. Share past challenges, future commitments and recommendations/tips.
3. Pass on reading materials to prepare for next meeting, including:
   1. Position binder with notes.
   2. Position description and responsibilities.
   3. Status reports on existing projects.
   4. Past project notes.
   5. Templates, online documents, and other resources.
   6. Committee member list (when applicable).
   7. Contact list of Society and Campus resources.
   8. Semester Schedule of Events.

# Meeting Two Agenda Points

*Tip: Keep focused on information transfer, not “here’s how to do your job”, as the incoming leader will have his/her own methods for doing things.*

1. Review all reading materials from Meeting 1.
2. Review Chapter Constitution together.
3. Discuss all Resources, existing relationships and preferred types of communication.
4. Discuss Committee Development (when applicable).
5. Review any technology and other resources frequently used for execution of position.

# Meeting Three Agenda Points

*Tip: This occurs during a regularly scheduled Executive Board Meeting.*

1. Introduce the new Executive Board member to the rest of the board, sharing the responsibilities of each position and something personal about each person.
2. Meet together with the Advisor for 10-15 minutes after the meeting, covering:
   1. The Advisor’s expectations for the new board member.
   2. When/How the Advisor can serve as a resource for assistance.
   3. What type of communication is preferred, and the frequency.
3. Transition any final physical materials (keys, bank account permissions, etc.) at the conclusion of this final meeting – be sure to schedule enough time for whatever needs to be accomplished.

**TRANSITION MEETING NOTES**

Enter position name, date of meeting, and notes for each section below, and then have each attendee sign.

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| --- | --- | --- | --- |
| **Transition Meeting 1 for:** | | | **Date:** |
| 1. Review purpose, responsibilities and expectations of the position, and committee (when applicable). | | *Specifics Covered:* | |
| 2. Share past challenges, future commitments and recommendations/tips. | | *Specifics Covered:* | |
| 1. Pass on reading materials to prepare for next meeting, including:    1. Position binder with notes.    2. Position description and responsibilities.    3. Status reports on existing projects.    4. Past project notes.    5. Templates, online documents, and other resources.    6. Committee member list (when applicable).    7. Contact list of Society and Campus resources.    8. Semester Schedule of Events. | | *Specifics Covered:* | |
| President/Vice President  Signature: |  | | |
| Outgoing Board Member  Signature: |  | | |
| Incoming Board Member  Signature: |  | | |

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| **Transition Meeting 2 for:** | **Date:** |
| 1. Review all reading materials from Meeting 1. | *Specifics Covered:* |
| 2. Review Chapter Constitution together. | *Specifics Covered:* |
| 3. Discuss all Resources, existing relationships and preferred types of communication. | *Specifics Covered:* |
| 4. Discuss Committee Development (when applicable). | *Specifics Covered:* |
| 5. Review any technology and other resources frequently used for execution of position. | *Specifics Covered:* |
| President/Vice President  Signature: |  |
| Outgoing Board Member  Signature: |  |
| Incoming Board Member  Signature: |  |

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| **Transition Meeting 3 for:** | | | **Date:** |
| 1. Introduce the new Executive Board member to the rest of the board, sharing the responsibilities of each position and something personal about each person. | | *Specifics Covered:* | |
| 1. Meet together with the Advisor for 10-15 minutes after the meeting, covering:    1. The Advisor’s expectations for the new board member.    2. When/How the Advisor can serve as a resource for assistance.    3. What type of communication is preferred, and the frequency. | | *Specifics Covered:* | |
| 3. Transition any final physical materials (keys, bank account permissions, etc.) at the conclusion of this final meeting  – be sure to schedule enough time for whatever needs to be accomplished. | | *Specifics Covered:* | |
| President/Vice President  Signature: |  | | |
| Outgoing Board Member  Signature: |  | | |
| Incoming Board Member  Signature: |  | | |