

PLAN FOR NEWLY ELECTED OFFICERS

First and foremost, understand that a transition cannot take place over a single night or weekend, but involves a series of discussions and workshops. Equally important to understand is that from the first day in office, each and every officer must begin to plan for the inevitable transition that will come when he or she leaves office.

_____Review Role/Responsibilities of the Position.

Don't accept a position unless you fully understand the responsibilities. You may not completely understand everything until well into your term, but accepting a position without first reviewing the job description is asking for failure.

_____Discuss the Position with the Outgoing Officer.

Ask the current officer to share his or her perspective on the position and the challenges faced in getting the job done. You may want to ask about . . .

- the three most important or largest responsibilities associated with the position.
- the amount of time necessary to complete tasks.
- the most difficult responsibilities of the job.
- factors making it difficult to complete tasks (lack of time and money, resistance from others, etc.).
- the most rewarding accomplishments of the past year.
- personal goals that person would set if he or she had the position for another year.
- things that person would do differently.

_____ **Announce Change of Officers.** Distribute a press release/correspondence announcing the election of new officers, particularly the executive positions.

_____Complete Chapter Officer Report.

_____ **Change Names on Financial Accounts.** Compose a letter (on organization letterhead) indicating that a change in officers has occurred and forward it to the financial institution(s) where the organization's accounts are located. Indicate who no longer has authority to sign financial documents and who now has this authority. Be sure to include the Social Security number, title, and local address of each individual.

_____ **Obtain Updated Officer Manual.** Don't let this task go to chance. Request that each outgoing officer bring his or her officer manual either to the chapter meeting at which elections occur or the following meeting, even if the manual is not updated.

_____ **Obtain Records and Supplies.** Get the necessary manuals, reports, supplies, etc. from the outgoing officer. As a priority, obtain a copy of the organization's Constitution and Bylaws and a full description of the role and responsibilities of your position. If you do not receive all materials at the same time, establish a deadline and meeting time at which you will receive the remaining materials.

_____Participate in Installation of New Officers.

_____ **Review Duties and Responsibilities.** Review each of the items you've obtained (above) for the specific rules, regulations, and responsibilities of your position. Start with the Bylaws and the Officer Manual for your position. As you conduct your review, prepare a list of questions you

want to ask the outgoing officer about the operating practices in place for completing these duties. Also look for information about responsibilities the previous officer assumed but are not listed as specific duties of the position. (Did the outgoing officer take on responsibility for duties that others should have completed?)

_____ **Review Activity and Project Reports.** If done properly, each officer should complete a record of activities and projects on a monthly basis during his or her term. This record should offer at least a list of events the officer coordinated, a list of individuals with whom he or she worked to plan the events, and the costs of such events.

_____ **Meet with Outgoing Officer.** By this point in the transition, you should have plenty of questions for the outgoing officer. Along with the questions noted in reviewing the records and supplies you have received, discuss with the outgoing officer your assessment of the organization and upcoming meetings, as well as suggestions the outgoing officer might have.

_____ **Review the Budget.** In addition to the figures that may or may not be in the activity records, you should review any other records of the budget/expense reports for both the chapter and the position.

_____ **Establish Goals.** In what direction do you want the organization to go? Before the entire chapter can support your goals for the upcoming year, you must get the support of the other chapter officers.