Each chapter has an obligation to hold elections for new officers and then train the incoming officers. The chapter’s future success relies upon the support and training you provide to the officers who follow you. The chapter president has a special role in chapter transition, ensuring that each officer has been trained as well as possible. Encourage all your officers to start thinking now about how to transition to the successors, even though your own terms are just beginning, thinking about what information the next officer needs, planning how they will pass on information, continuously reminding officers to record procedures and keep important documentation. Please ensure each officer has a good understanding of the steps to a successful chapter officer transition. Copy this and give it to each officer.

1. Prepare for transition throughout the year.

During the year, each officer will learn more about their position and improve upon what the previous officer has done. It is important to take notes and record what you are doing and how you do it. Each chapter officer has a responsibility to prepare for officer transitions throughout the year. These instructions will be critical for the next officer to learn from, and then improve upon.

1. Orient new members to chapter positions.

It is important to orient the incoming chapter on the general expectations of each chapter office. With a better understanding of chapter positions, new members will be prepared to run for office, and elections will be smoother. It is a good idea to dedicate time in your chapter’s orientation to introducing the office positions of the chapter.

1. Hold elections with enough time for a proper transition.

You must ensure that there is ample time for each position to transition prior to the current chapter’s graduation. Each chapter should aim to hold elections one month, or more, before the last day of classes. This is a busy time of year and you do not want to be trying to transition office during exam week. Make sure you are considering officer transitions when you are planning your membership selection timeline.

1. Hold a transition prep meeting with current officers.

All current officers should be prepared to transition their office. The chapter president should hold an executive meeting to discuss what the expectations of each officer are in transition, how transitions will be held, and what information should be provided to each officer. This meeting is important to ensure all officers are on the same page and that no information is lost on the way.

1. Have something written to pass along to each officer.

Information passed along in conversation can be forgotten, but the written word is hard to forget. Each officer should have something written to pass along to the next officer. This can be a binder, a flash drive, a Google drive or a SharePoint folder that is added to and passed along each year. Binders should include a description of the officer position, details of the responsibilities and how to execute them, a copy of the Officer & Advisor Handbook, any other handbooks relevant to the position, Mortar Board and local chapter *Bylaws*, chapter history, specifics about events or programs, and any reports relevant to the position. It is better to update the position binder as the year progresses, the president should remind each officer half way through the year to make sure they are caught up on updating their binder or other officer documentation.

1. Hold in-person officer transition meetings.

Whether you decide to meet as a group or have one-on-one individual officer transition meetings it is critical to meet in person to pass along information. This will give each incoming officer the opportunity to ask specific questions about the position. Tip, pass along your written materials prior to the incoming officer before the meeting so they will have time to read about their positions. This will provide incoming officers context to ask more in depth questions and clarify their understanding. If you have one-on-one meetings, hold them all at the same time so you can be sure that it is actually done.

1. Lead by example.

It is a good idea to hold combined chapter meetings, executive meetings or even a chapter event with the incoming and retiring chapter. This will provide an example for the next set of chapter officers to follow as far as how to structure meetings and run chapter business.

1. Do not forget to transition the chapter as a whole.

Transitioning the entire chapter is just as important as officer transitions; you want to make sure the next chapter is ready and prepared to continue where your chapter left off. Orientation is just the introduction, to properly transition hold joint chapter meetings, activities or social events. Not only does this provide time for incoming members to learn about what being in Mortar Board means and learn from the current chapter, but it also provides an opportunity for networking between incoming and graduating members.