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Each chapter should hold elections for new officers and train the incoming officers before Spring semester ends. The chapter's future success relies upon the information, advice, and support you provide the new officers to carry on your good work! The chapter president should ensure that each officer has been trained and that all digital and print resources have been passed to the next set of leaders. Encourage all your officers to start thinking now about what information the next officer needs and how they will pass on information. Please ensure each officer has a good understanding of the steps to a successful chapter officer transition, continuously reminding officers to record procedures and keep important documentation. Share this guide with each officer.

**Officer Transition Checklist**

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|[ ]  Prepare for transition throughout the year. |
|[ ]  Complete all relevant **chapter reports** and pay **chapter fees.** |
|  |[ ]  Chapter Action Plan (September 30) |
|  |[ ]  Candidate Request/Official Membership Report (Spring) |
|  |[ ]  Chapter Annual Report (May 15) |
|[ ]  **Orient new members** to chapter positions. |
|[ ]  **Hold elections** with enough time for a proper transition. |
|[ ]  Hold a **transition prep meeting** with current officers. |
|[ ]  Have something **written to pass along** to each officer. |
|[ ]  Hold **in-person officer transition** meetings. |
|[ ]  Lead by **example**. |
|[ ]  Do not forget to **transition the chapter** as a whole.  |

1. Prepare for transition throughout the year.

During the year, each officer will learn more about their position and improve upon what the previous officers have done. Taking notes and recording what you are doing and how you do it is important. 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. Complete all relevant chapter reports and pay chapter fees.

One of the best ways to transition chapter leadership is to ensure your chapter completes the three mandatory reports throughout the year: Chapter Action Plan, Candidate Request/Official Membership Report, and Chapter Annual Report. All reports can be found on the [**Chapter Reports webpage**](https://mortarboard.org/collegiate-chapters/reports/).

 **Chapter Action Plans** are working documents to help plan the activities and timeline for the upcoming year. Region Coordinators work with chapters as they lay out their Mortar Board year. Chapter Action Plans are **due September 30** for semester schools and October 15 for quarter schools.

 **Candidate Request / Official Membership Report** is critical to maintaining your chapter’s membership records. The Candidate Request is submitted at least two weeks before tapping; it signals the National Office to send the membership packet with certificate and pins and create their online account. The Official Membership Report is submitted three weeks after initiation; it finalizes who has paid membership dues, which students are returning as continuing students, and gives the chapter record of what dues may be owed.

 **Chapter Annual Reports** are the year-end summary to share what your chapter did this year, what you discovered along the way, and what your recommend for next year. You’ll submit your new officers’ information, confirm advisors, and apply for Collegiate Awards. Chapter Annual Reports are **due May 15** for semester schools and June 1 for quarter schools.

Also, please ensure all members have paid the national membership dues prior to the close of the Spring semester. You’ll also want to make sure your chapter has paid the Chapter Annual Fee.

1. Orient new members to chapter positions.

It is important to orient the incoming members 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 before the current chapter’s graduation. Each chapter should aim to hold elections one month, or more, before the last day of classes to allow time for the new chapter and officer team to meet following elections. This is a busy time of year and you’ll want to wrap up officer transition prior to the last day of classes. 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. Be sure to consider both print and digital files, as well as passwords to social accounts, banking information, and email accounts. 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, so be sure to also provide written documentation. 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, chapter Bylaws, chapter history, 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 halfway through the year to make sure they are caught up on updating their binder or other officer documentation.

New members should be alerted to the national resources available on Mortar Board’s website, including: the Officer & Advisor Handbooks, any other handbooks relevant to the position, Mortar Board *Bylaws*, best practices resources, and logos and promotional items.

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. We recommend passing along written materials to the incoming officer before the meeting so they will have time to read about their positions and formulate questions. 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 completed.

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 graduating chapter. This will provide an example for the next set of chapter officers to follow regarding 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.