



Leadership Transition Plan

President

- Review job descriptions for all chapter officers
- Be sure the Secretary sends officer report form to National
- Meet with Treasurer to handle necessary business and understand chapter's financial status
- Sign new financial account cards at bank if necessary
- Ensure officer transitions occur smoothly and in a timely manner
- Hold chapter planning meeting
- Arrange for National Director/Regional Governor to install officers

Vice-President

- Discuss duties and assignments with chapter president
- Schedule chapter meetings
- Coordinate delegates to state/national meetings

Secretary

- Transfer all original documents and minutes
- Transfer copies of correspondence
- Submit officer report form to national
- Review any Certificates of Insurance, contracts, etc.

Treasurer

- Transfer original copies of all chapter financial records
- Transfer bank account information
- Transfer bank statements, annual statements, budgets, etc.
- Establish financial management system (preferably computer based)

Webmaster

- Obtain any needed passwords/login details
- Post current chapter officers with email links on website
- Post meeting dates on chapter calendar of events
- Post monthly chapter newsletters
- Post monthly message from chapter president
- Delete old information and keep site information and links current