



Chapter Leader Transition Recommendations

Why is a Transition Plan Needed?

With changing work environments, relocations, and family commitments, an organizational structure that allows leadership to transition is ideal. One of the biggest drivers of chapter success is stable leadership. It is critical for chapters to develop a succession plan that is in place before transition is necessary. It is important to have continuity so we do not lose momentum in a chapter area and ensure chapter engagement is consistent.

How to Choose the Right Leader?

It is essential to find the right successor to lead the chapter. The new leader should be active in the chapter and participates in events. Think of someone who has volunteered to help in the past and has the available time for the commitment. Characteristics of a good leader are a person who is energetic, creative, and can easily build relationships.

Steps to Follow for a Chapter President

When there is an outgoing president, the following steps should be taken:

1. Consult and follow your chapter's By Laws if available. If not, continue to step 2.
2. Alert the chapter board and begin to seek a replacement
 - a. The outgoing chapter president should construct a chapter update to alert the chapter board that he/ she will step down and to ask for those interested in the position to send an email to him/her. The chapter president and chapter leadership should collectively review applicants and select a new candidate based on interest, willingness, and demonstrated skill sets.
 - b. If the outgoing chapter president is unable to find a replacement, he/she should train the vice president to serve as interim, and the chapter board should continue seeking a replacement. In this case, it is helpful to host a Chapter Leader Interest Meeting for local alumni.

3. Once a new chapter president is selected, post a chapter president profile on social media pages, plan a board meeting and alert the Alumni Association of the change by completing the Chapter Leader Transition Form post on the website.
4. If possible, the outgoing and incoming president should meet to discuss chapter business, upcoming events and long-term plans.

Steps to Follow for Other Chapter Leaders

At all chapter events, be sure to note highly engaged and involved alumni. If a chapter leader must step down, try reaching out to these alumni individually to seek a replacement. A Chapter Leader Interest Meeting is helpful in recruiting a new chapter board as well. If these steps do not garner interest, announcing opening positions via social media and email can create interest in the position from your chapter membership. Remember to alert the Alumni Association to any changes by completing the Chapter Leader Transition Form.

Keys to a Successful Transition

- If you know you will need to let go of a chapter leader responsibility, notify the WVU Alumni Association by emailing the Director of Engagement, Meridith Balas at Meridith.balas@mail.wvu.edu. We'll help you through it!
- Elect or choose a successor to train and mentor for six months to a year leading up to your departure if time allows.
- It is recommended to create a chapter leader notebook that contains all documents, notes and any helpful information to be shared with the incoming leader.
- Chapters should consider selecting a President-Elect as an officer to ensure an easy transition and avoid the position being vacant.
- As a minimum, the outgoing and incoming chapter leader should have a meeting to discuss chapter business, upcoming events and any long-term plans.
- When a new leader is in place, the outgoing leader or chapter secretary can construct an email to alert the chapter of his/her departure and introduce the new chapter leader.
- Encourage new chapter leaders to attend the Alumni Leaders Institute in Morgantown each may. Travel assistance is available.