

## Officer Transitions

This guide has been designed to provide tips on conducting virtual elections and officer transitions, when necessary.

### Officer Elections

Review your chapter's bylaws to determine the process, timelines, and voting requirements for regular elections. Assuming the chapter's bylaws do not specifically prohibit it, conducting elections as part of a virtual chapter meeting should be similar to traditional in-person elections.

An example process might look like this...

- The Commander announces the date for elections, the process, and deadlines for members to submit themselves or be nominated for one or more positions.
  - Follow what your bylaws dictate for advance notice, nominations, or a slating procedure
- The chapter convenes for a virtual business meeting on the appointed date for officer elections, using Zoom or a similar virtual meeting platform.
- Nominations are called as normal, officers make speeches, and the membership may ask questions.
  - You may wish to have nominees for a specific position drop out of the meeting during other candidates' speeches and Q&A, as well as the chapter deliberations.
- Voting could be conducted in one of several ways, deferring to local bylaw provisions if they require secret or open balloting.
  - Open ballot: Recorder does a roll call of members and each member verbally responds with their candidate of choice. Recorder tallies votes and announces results at end of roll call. If necessary, a run-off vote is conducted per chapter bylaw requirements.
  - Secret Ballot: Recorder sets up an online survey (e.g. [Poll Everywhere](#), [Survey Monkey](#)) for each officer position and includes candidates for each office. Members are prompted to complete the survey from their phone either live during the meeting or at an appointed time following all positions' speeches and discussion; if the latter (i.e. voting on all positions at once, after all nominations have been reviewed), results would need to be announced at the next chapter meeting.

### One-on-One Officer Transitions

In the days leading up to elections, outgoing officers should prepare transition materials for their successors.

- [Officer Transition Checklist](#) – a list of things to prepare and provide for your successor.
- [Officer Binder Checklist](#) – a list of resources to compile and prepare in a digital format to be handed over to the incoming officer.

In the days and weeks following elections, outgoing and incoming officers should meet virtually for one-on-one sessions to review:

- Materials prepared by the outgoing officer – using the two checklists referenced above.
- Lessons learned by the outgoing officer.
- General schedule of what to expect and prepare for throughout the year.
- Deep dive into any manuals, policies, or planning documents created and regularly referenced by the outgoing officer.
- [Strategic plan or action plans](#) for their operational area.

Newly elected officers are also encouraged to review their [officer resource page](#) and manual, and then conduct [new officer goal setting](#).

### Executive Committee Transitions

In addition to the one-on-one transition suggestions from above, new executive committees should review [successful habits](#) and conduct [goal setting](#) for the committee.

New executive committees should also have all officers review their [action plans](#) and make updates for the new term. After determining chapter-level goals (e.g. chapter size, major accomplishments and events, desired changes), have officers update the [chapter's strategic plan](#).

Use the [Officer Transition session](#) from All Chapter LEAD to get outgoing and incoming executives together for a transfer of information and planning session for the coming year. The session is written as a single-day retreat but could be broken up across a few afternoons or evenings. If you conduct the one-on-one transitions at an earlier time using the steps suggested above, the committee transition session can focus on the collective responsibilities and goal setting for the executive committee, rather than individual positions.

Schedule a follow up session to assign members to committees and set expectations and timelines for committees to start meeting and develop their [action plans](#) for the year.

Get all your officers on the same page at the outset by having them watch the [Simon Sinek talk on the Golden Circle](#). Process with the [discussion questions](#) from this popular video from the Sigma Nu Talks collection.

If you need additional assistance in this area, please contact your [Leadership Consultant](#).