

# ***President to President-Elect Transition: A Guide to Successfully Onboarding the New President***

## **Overview**

Many chapter leaders do a great job of ensuring a smooth transition between the outgoing, or retiring, chapter president and the new incoming president. Recently, we surveyed some of the more seasoned chapters to find out how they transition their presidency. Although some have a more formal transition while others use a less formal method, they all share a common process: good communication between the two leaders and an effective checklist of what needs to be done prior to the president-elect taking office.

This transition guide is segmented into three main areas that should be followed in this order:

- Understanding the Role of the President (*items the president-elect should review*)
- One-on-One Transition Meeting (*informal meeting between the outgoing president and the incoming president*)
- Board Retreat (*for all members of the chapter board, including those who are retiring and all new incoming board members*)

## ***Understanding the Role of the President***

Before the outgoing president and incoming president have their transition meeting, the new president should take some time to become familiar with the duties and responsibilities of the chapter president's position. This includes the obligations and expectations of the role of the president's position. Most chapters simply use the job description that can be found in the [Chapter Policy and Operations Manual](#) (page 4), but a number of chapters have expanded on this description to create their own president's duties and responsibilities. This, of course, depends on the size and level of programming a chapter provides its members, plus the size of the chapter's board of directors. Larger chapters tend to have more board members which helps in delegating assignments and workload, whereas smaller chapters may only have five members on their board, thus the necessity for the chapter president to take on more tasks.

The incoming president will have the opportunity to meet one-on-one with the chapter's outgoing president to learn more about the transition at the local level, but first it's important for the new president to become familiar with the many resources available to chapter presidents. ONS Chapter Relations staff have developed a number of resources and video tutorials to help the new president learn the requirements of the position along with what's required of each chapter in terms of the annual Chapter Charter Renewal (CCR requirements can be found on page 3 of the Chapter Policy and Operations Manual). It's now a requirement for all incoming chapter presidents (and incoming chapter treasurers) to review the online resources and webcasts for each position. The following chapter president resources can be found on the [Chapter Leaders Community](#) site under 'President Resources' tab:

- Role of the President webcast
- New Chapter Model webcast
- Chapter Policy and Operations Manual
- Chapter Standing Rules Form
- Chapter Annual Report
- Chapter Scholarship Programs webcast

In addition to the above chapter president resources on the Chapter Leaders Community site, you'll find the [Leadership in a Box](#) program developed by the ONS Leadership Development Committee. This program is designed to help leaders self-evaluate where they stand in their career and think about how

they might take a next step in the development of their leadership skills. This program is meant to address individuals at many different stages of their careers by self-assessment, group discussion, and the presentation of overall pathways throughout example careers.

In addition to the online resources available to the president, ONS hosts the annual Chapter Leadership Weekend (CLW) program held each summer in Pittsburgh, Pennsylvania. The CLW is an ideal learning environment for incoming presidents. ONS pays for one chapter leader per chapter to attend so there's no cost to the chapter other than the CLW registration fee (which is paid through the annual Chapter Charter Renewal fee).

Chapter leaders will also have the opportunity to invite an ONS National Board member to attend one of their chapter events. This program is under development and will be announced soon, so visit the Chapter Leaders Community site for more details.

And finally, perhaps one of the best resources available to the incoming president is the ONS Chapter Relations staff. Our staff is knowledgeable on all the chapter resources and requirements, and happy to assist the new president on chapter matters. Staff can be reached at [chapters@ons.org](mailto:chapters@ons.org) or by calling (412) 859-6320.

### ***One-on-One Transition Meeting***

As noted earlier, it's a great idea for your chapter to have an annual board retreat that provides an opportunity for your entire board, including the new, incoming board members, to meet and plan out the next year's chapter activities. But first, consider scheduling a one-on-one meeting between the outgoing president and the incoming president.

One of the reasons we recommend that the new president review all available chapter president resources in advance of the one-on-one meeting is so the incoming president is familiar with the job duties and responsibilities of the president, as well as the annual chapter chartering requirements, as prescribed by ONS National.

So, what should be covered in the one-on-one meeting? Here are a few suggestions:

- Review the recent election results. If any positions were not filled, or became vacant, discuss the situation and determine a plan for the chapter's nominating committee (or board) to fill the vacant positions.
- Assuming the chapter has a strategic plan, or set goals for the current year, discuss which goals were met, which weren't, and which goals need to be rolled over into the next year.
- Critique the past year and talk about what worked and what didn't work in terms of chapter programs and events.
- Review the effectiveness of the chapter board to identify improvement opportunities.
- Talk about your relationship with the soon-to-be past president and her/his role as advisor to the new president.
- If your chapter president keeps records, documents, binder, etc., it is important to hand those off to the incoming president.
- If your chapter uses a separate chapter email account, or social media accounts, and requires the president to utilize these, be certain to securely transfer the Username and Password to the incoming president.
- If the president is a signatory on the chapter's bank account(s), it is vital to work with the treasurer and bank to have the new president added as a signatory.

Having a successful one-on-one meeting between the two leaders is a great way to help prepare the new incoming president to take on the role at the first of the year. Plus, it helps to make sure any unfinished business is addressed.

### ***Board Retreat***

We've shared with you why it's essential for the outgoing president and the incoming president to meet first, one-on-one, to critique the past year, to ensure all loose ends are addressed and also to make sure both leaders are on the same page before scheduling the full board retreat. So, why do an annual chapter board retreat? Is it really necessary?

Although a board retreat is not a requirement, scheduling one each year is a great way to get buy-in on the goals and objectives of the chapter from everyone on your board. Additionally, a board retreat sets the tone and expectations for the coming year. Having everyone in one room actively participating helps generate excitement and motivation for all, especially the brand-new board members.

There are a variety of board retreat formats to consider, from a shorter, evening meeting, to half-day retreats, to full-day retreats even, depending on the size of the chapter and number of programs and events. Regardless of the length of your retreat, consider scheduling the retreat away from the hustle and bustle of the work environment and opt for a more, quiet setting, that is more conducive for interaction and creativity. Some chapters use a board member's home, whereas some choose to have their retreat at hotel or resort. Regardless of location, make sure to schedule your retreat well in advance. Members have busy schedules, both at work and home, so make sure to get this on everyone's calendar as soon as you can.

In addition to your retreat being engaging and productive, it should be fun! Consider kicking-off your retreat with a fun 'ice breaker' which is a great way to get your new board members interacting with each other.

Another important element of the retreat is to have an agenda that's shared with everyone well in advance. Let your board members know what will be covered such as reviewing last year's progress, this year's goals, report-out assignments (if applicable), and what's expected of each attendee. If any of your outgoing, or retiring, board members are invited to attend, have them meet with their new replacements prior to the retreat. Some positions, like treasurer, membership chair, and programs chair, may have documents that need to be transferred to the new person, so ensure that these transfers happen before (or at) the retreat. Also be sure to transfer any social media or chapter email Usernames and Passwords, if applicable.

Most chapters utilize their retreats to plan out the year's programs, events, and special activities, but remember to include a portion of the retreat to talk about the chapter's long-range plans, as well. Healthcare and technology are changing rapidly, so it's important to include on the agenda a discussion of where you want the chapter to be and what you'd like to attain in 3-to-5 years, even longer. Also, check out the ONS National Board of Director's strategic initiatives and incorporate those goals and objectives into the chapter's strategic plan.

Board retreats are a great way to set the stage for the coming year and to ensure everyone's buy-in with the direction of the chapter. It's a great opportunity for the new president to lead the board to a successful year!

### ***Summary***

We hope this guide will help you achieve a successful transition of leadership. Don't forget to review the many online resources posted on the [Chapter Leaders Community](#) site, and as always, the ONS Chapter Relations staff are available to assist you with the transition. Good luck!