

What An Association Chapter Board Transition Should “REALLY” Look Like



Too often, when an association chapter board terms end, board members step down without a clear plan for ensuring their replacements have easy access to the tools and processes they need for a seamless transition. As a result, many of the lessons learned and the successes they had in that term aren't passed to the new board. Often, the new association chapter board takes a few steps back and lose the momentum gained by the previous board.



Think about all the time and anxiety you can save with an association chapter board transition plan, both for the board and the chapter. Here are a few things to keep in mind as you plan your chapter board transition, to help it go smoothly while keeping everything moving forward.

In addition to what we're recommending below, you'll want to do a complete board process review well in advance of the transition. Here, you'll pull together a complete list of what you want to transition correctly with the new association chapter board. This can be an in-depth exercise and include everything from all your systems, forms, and contracts to domain names, member applications, web content, etc.

Update your association chapter website to reflect the new Board of Directors. It's a bad start when the chapter board members listed on your website are no longer the ones in those positions. In



addition to your board of directors' page, look at your contact page, events pages, home page, etc., to see where names and contact details need to change.

Create new Admin User Accounts for your systems. Update your primary account holder information for any systems you use to ensure the new board member responsible for the system has the proper access.

Complete any available trainings. To ensure everyone is comfortable with the systems you use, ask new board members to complete any available system trainings. You may also want to ask if the person currently in the role can be available for a time, to answer questions for the new board member.

Have all transitioning board members change their email signatures. Those leaving the board should remove their position from their association chapter email signature, while those joining should add their new titles to theirs.

Review any documents that list your board members. Do your letterhead and invoices list the right contacts? You may need to change names, phone numbers, addresses, credit card numbers, etc.

Set priorities for your new association chapter board. In addition to all the tactical changes you'll want to make, you'll want to set a few priorities for the new board. Hold a joint meeting with all the transitioning board members and get everyone to agree and collaborate on next steps. Are there things your existing association chapter board didn't accomplish that should be at the top of the new board's To Do list, like:

- **A website redesign.** If it's been more than two or three years, it could be time for a complete association chapter web review and redesign. Redesigns help keep members and potential members engaged with what you have to offer, while also incorporating your new board's vision.
- **Implementing Association Management Software (AMS).** If you're still using multiple systems, excel documents and pen and paper registrations, this is the time to consider transitioning to a new association chapter AMS. When you work with a single system, everything becomes easier to manage, with one location for the majority of what you need.

To make it easy for everyone, put your transition process into a guide or a checklist; many AMS systems like StarChapter provide a task list to help users. Make it as easy as possible for board members to clearly see exactly what they need to do to avoid losing the outcomes of all their hard work.

