

CNSA Chapter Leadership Transition Template

1. Welcome Letter

- A brief letter from the outgoing officer welcoming the new leader.
- Words of encouragement and any advice!

Example: "Congratulations on your new role! This binder will guide you. I'm always available if you have questions during your transition."

2. Officer Position Overview

- Official title
- Role summary
- Responsibilities & expectations
- Key projects/programs you oversee
- Approximate monthly time commitment

Example:

- **Official Title:**

Vice President, Monterey Peninsula College SNA

- **Role Summary:**

Supports the Chapter President and helps coordinate the board's and chapter's activities. Serves as a key point of contact for board collaboration and steps in when the President is unavailable.

- **Responsibilities & Expectations:**

- Attend and help facilitate all board and general meetings
- Maintain communication among board members
- Assist with event planning and follow-up
- Support committees as needed
- Step in for the President when necessary

- **Key Projects/Programs You Oversee:**

- Co-planning the chapter's major events (e.g., Annual Health Fair, Big Sur Marathon)
- Organizing leadership check-ins or board bonding activities
- Helping with chapter elections and transition planning

- **Approximate Monthly Time Commitment:**

6–8 hours per month (varies slightly with event season)

3. Calendar of the Semester/Year

- Month-by-month chapter activities, events, and meetings
- Important deadlines – constituency, awards, nominations, resolutions (local, CNSA, and NSNA)
- Elections timeline
- Budget/dues deadlines - memberships

4. Contact List

- Advisor(s) contact information
- Current board members (names, emails, phone numbers)
- State CNSA leaders
- Key community partners (hospitals, sponsors, vendors)

5. Meeting Templates

- Sample board meeting agenda
- Sample general member meeting agenda
- How to organize a meeting (prep checklist)

6. Event Planning Materials

- Step-by-step event planning guides
 - Process of how to market event
 - Regulations to follow
- Contacts
 - For event spaces/catering
 - Donors
 - Vendors
- Budget templates
- Flyers or promotional examples from past events
- Donation request / Thank you letters
- Debrief notes from previous events (what worked, what to fix)

7. Important Documents

- Chapter Constitution & Bylaws
- Chapter policies (attendance, fundraising, reimbursement)
- CNSA/NSNA Membership Information
- Sample minutes from meetings

8. Financial Information (for President, VP, Treasurer roles)

- Budget tracking sheets
- Steps to follow when requesting chapter funds
- Fundraising history (what events raised how much)

9. Ongoing Projects

- Description of any projects in progress
- Next steps/timelines
- Assigned contacts (if applicable)

10. Advice & Lessons Learned

- "If I could go back, I would..."
- Top 5 tips for success
- Common pitfalls to avoid

11. Transition Plan

- Timeline for shadowing/outgoing officer support
- Key tasks to complete during the first 30/60/90 days
- Planning for mentorship

12. Notes Section

- Blank pages for the new officer to add their own notes, contacts, and reflections as they grow into the role.
- You can separate folders by each year/semester

Tips

- **Physical Binder:** Divider tabs for each section.
- **Digital Version:** Google Drive folder with subfolders for each section (very easy to update over time).
- Tailor it to what would work best for your chapter.
- Have ongoing email addresses for each position to pass on.
- Find ways to improve and build on it.