

# Student Veterans of America Chapter Transition Checklist



Embarking on a new Chapter role requires a meticulous approach, and the Chapter Transition Checklist serves as the guiding compass for a seamless transition of leadership roles within the Chapter.

## PRESIDENT

01

- Collaborate with the Secretary to update MySVA and campus roster (if applicable) with new officer contact information
- Create a document with contact information for all incoming Chapter Leaders, outgoing Chapter Leaders, Chapter Advisor, SVA HQ contacts, campus or university contacts, and community contacts, and share it with all constituents and Chapter members
- Schedule initial transition meetings:
  - Outgoing Chapter officers (all), incoming Chapter officers (all), and Chapter Advisor
    - Review and discuss the Chapter Strategic Plan as a group (if revisions needed, plan to do so later)
    - Review and discuss the Chapter Mission as a group (if revisions needed, plan to do so later)
    - Review and discuss the Chapter by-laws / Chapter Constitution (if revisions needed, plan to do so later)
    - Review the existing budget and funding status as a group (if revisions needed, plan to do so later)
    - Brainstorm and discuss individual and Chapter priorities for the upcoming year
    - Review or create a master calendar for the upcoming academic year
  - Outgoing Chapter officer (by role) with incoming Chapter officer (by role)
    - Review and transition all role-specific documents
    - Test and confirm all passwords and accounts
    - Review all resources provided by SVA HQ and campus for officer role
- Set up a minimum of two additional Chapter Leadership planning meetings to:
  - Discuss expectations for SVA meeting types, frequency, locations, and possible schedules
  - Review and update the status of any old / ongoing business
  - Confirm individual officer handovers and introductions are complete
  - Confirm division of labor for general operations (minutes, emails, agendas)
- Confirm student organization status or application procedure for upcoming year with campus
- Send an introductory email to all relevant contacts (member lists, student veterans)

# Student Veterans of America

## Chapter Transition Checklist

(continued)



### VICE PRESIDENT

02

- Assume control of past Chapter event and programming notes
- Assume control of all vendor, campus, and community partner contact information
- Assume control of all recruitment plans or notes

### TREASURER

03

- Assume control of all Chapter banking accounts, invoices, bills, receipts, budgets, and financial reports and records
- Assume control of all donor information and records
- Review university guidelines on banking, training, and financial requirements

### SECRETARY

04

- Collaborate with the President to update MySVA and campus roster (if applicable) with new officer contact information
- Review the Chapter mySVA roster and campus roster (if applicable) to ensure accuracy
- Inventory all Chapter keys, pass cards, supplies, and other equipment
- Update and review all social media accounts
- Assume control of all previous publications or newsletters
- Assume control of all previous meeting minutes

