

replace *italicized phrases

Position Elect Training

Month Year

- Role Duties and Expectations
 - Duties
 - *Duty 1*
 - *Duty 2*
 - Expectations
 - *Expectation 1*
 - *Expectation 2*
- What you need to know to carry out your role
 - *Info 1*
 - *Info 2*
- Previous Initiatives (*what you were working on, what is left to complete*)
 - *Current Project*
 - *My idea for a future initiative*
- Transferring duties
 - Specific timeline:
 - *Event 1*
 - *Event 2*
- Share your personal experience
 - *Experience*
 - *Difficulty*
- Provide advice and/or recommendations
 - *Time Management*
 - *Where to get help*
- Questions?
- Your contact info
 - *You can text or call me (XXX) XXX-XXXX*
 - *You can email me xxxx@xxxx.com*

Sample Transition Document:

Treasurer Elect Training

May 2018

- Role duties and expectations
 - Duties
 - Keep track of finances and maintain records
 - Oversee committee budgets
 - Reimburse students as needed
 - Expectations
 - Apply for grants
 - Limit spending as necessary
 - Keep the chapter banking account at a minimum \$
 - Attend all executive board meetings
- What you need to know to carry out your role
 - How to access chapter bank account
 - Link website
 - Provide login information
 - The key to the petty cash drawer is here
- Previous Initiatives (what you were working on, what is left to complete)
 - Provide sample budget for each committee based on past years
 - I have done this for 3 committees
 - Link to completed sample budgets
 - Still needs to be done for 2 more committees
 - Suggestions to complete sample budgets for remaining committees
 - You can find past years' budgets here
- Transferring duties
 - Specific timeline:
 - You can shadow me when I talk to our sponsors next week
 - I will handle all reimbursements up until May 3rd, 2017
 - You will handle all reimbursements after May 3rd, 2017
- Share your personal experience
 - Sometimes the website to access banking information is down. If that happens to you, wait a few hours and check again. It is usually up by then.
- Provide advice and/or recommendations
 - Set aside 2 hours each week
 - Don't be afraid to ask the president or advisor for help
- Questions?
- Your contact info
 - You can text or call me (XXX) XXX-XXXX
 - You can email me xxxx@xxxx.com