

EXECUTIVE LEADERSHIP TEAM – TRANSITION ACTION PLAN

Soror Name	Chapter Position - 2021	Transition Action Plan	Soror Name	Chapter Position- 2022
Lisa Brody	Basileus	<ol style="list-style-type: none"> 1. Meet with incoming Basileus to provide a report of the state of the chapter. 2. Electronic copy of last meeting agenda. 3. Sorority documents/records. 4. Provide storage key, PO Box key. 5. Bound copy of last year’s meeting minutes. 6. Copy of annual financial reports. 7. Copy of End of Year Chapter reports and Chapter Roster. 8. Transfer any chapter computer equipment, login information, passwords, etc. 9. Gavel Ceremony is conducted for the new incoming Basileus. 	Lisa Brody	Basileus
Jenee Skipper	1 st Anti-Basileus	<ol style="list-style-type: none"> 1. Provide Chapter Program Resource Guide to incoming Program Chair. 2. List incoming Program Chair on Chapter Roster form. 3. Provide copy of End of Year program report. 4. Provide last year chapter retreat survey results. 	Jenee Skipper	1 st Anti-Basileus
Rita Wesley	2 nd Anti-Basileus	<ol style="list-style-type: none"> 1. Meet with incoming 2nd Anti-Basileus and share knowledge. 	Rita Wesley	2 nd Anti-Basileus

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Erin Savage	Grammateus	<ol style="list-style-type: none"> 1. Meet with incoming Grammateus and Anti-Grammateus. 2. Provide copy of minutes (in 3-ring binder) from prior year. 3. Provide chapter recorder or other equipment to incoming Grammateus. 	Erin Savage	Grammateus
Monica McIntosh	Anti-Grammateus	<ol style="list-style-type: none"> 1. Attend transition meeting with the outgoing and new Grammateus as well as new Anti-Grammateus. 	Monica McIntosh	Anti-Grammateus
Delphinia Davis	Pecunious Grammateus	<ol style="list-style-type: none"> 1. Meet with incoming Pecunious Grammateus and share knowledge 2. Provide Cash Receipts Report, receipt book, and any outstanding soror invoices. 3. Train incoming on how to prepare/complete receipts, Cash Receipts Report, and the Transmittal of Funds Report. 4. Transition any equipment. 5. New Pecunious Grammateus must be bonded. 	Delphinia Davis	Pecunious Grammateus
Marilyn Fudge	Anti-Pecunious Grammateus	<ol style="list-style-type: none"> 1. Attend transition meeting with the outgoing and new Pecunious Grammateus. 2. New Anti-Pecunious Grammateus must be bonded. 	Marilyn Fudge	Anti-Pecunious Grammateus

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Bettye Newsome	Tamiouchos	<ol style="list-style-type: none"> 1. Meet with incoming Tamiouchos to provide the chapter’s financial statements/records & Fiscal Fitness Guide. 2. Transfer chapter check book, deposit slips, stamps, voucher forms, etc. 3. Outgoing Tamiouchos should set up a meeting with new check signers to update information with the bank and online access. 4. Provide logins & passwords. 5. Train incoming Tamiouchos on Quickbooks software. 6. Provide copy of Annual Report-Statement of Financial Position and Budget. 7. Prepare to train incoming Tamiouchos for budget preparation and completing the Annual Report. 8. Copy of last bank statement and bank reconciliation. 9. Provide any chapter equipment, financial software. 10. Provide insurance company information for bonding purposes. 11. New Tamiouchos must be bonded. 	Bettye Newsome	Tamiouchos

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LaTonya Alexander	Anti-Tamiouchos	<ol style="list-style-type: none"> 1. Attend transition meeting with the outgoing and new Tamiouchos. 2. New Anti-Tamiouchos must be bonded. 	LaTonya Alexander	Anti-Tamiouchos
Brandi Williams	Epistoleus	<ol style="list-style-type: none"> 1. Transfer online access to Constant Contact (login & password) & train on how to use Constant Contact. 2. Discuss how to handle chapter correspondence. 3. Transfer any remaining chapter stationery and postage to incoming Epistoleus. 	Brandi Williams	Epistoleus
Nikita Shivers	Hodegos	<ol style="list-style-type: none"> 1. Meet with incoming Hodegos and provide updated copy of Hostess Groups. 2. Provide contact information for florist. 3. Discuss bylaws with regards to Courtesies and what's budgeted. 	Angela Johnson	Hodegos
Ann Sherman-White	Anti-Hodegos	<ol style="list-style-type: none"> 1. Attend transition meeting with the outgoing and new Hodegos. 	Joy Avery-Wright	Anti-Hodegos
Rachel Cato	Philacter	<ol style="list-style-type: none"> 1. Meet with incoming Philacter and share knowledge. 	Rachel Cato	Philacter

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Manitia Moultrie	Parliamentarian	<ol style="list-style-type: none"> 1. Meet with incoming Parliamentarian to provide a report on any Bylaws recommendations. 2. Provide a copy of the Bylaw template form. 3. Provide copy of Roberts Rules of Order. 	Manitia Moultrie	Parliamentarian
Angela Beard	Ivy Leaf Reporter	<ol style="list-style-type: none"> 1. Meet with incoming Ivy Leaf Reporter and provide updated media list and report on state of chapter publicity/PR efforts. 2. Provide chapter camera and any equipment to incoming Ivy Leaf Reporter. 	Brittanye Blake	Ivy Leaf Reporter
Crystal Pruitt	Historian	<ol style="list-style-type: none"> 1. Meet with incoming Historian and share knowledge. 	Crystal Pruitt	Historian
Lynette Buchanan	Curator	<ol style="list-style-type: none"> 1. Meet with incoming Curator and share knowledge. 	Lynette Buchanan	Curator
Arilee Still	Chaplain	<ol style="list-style-type: none"> 1. Meet with incoming Chaplain and share knowledge. 	Arilee Still	Chaplain
LaWanda Johnson LaTonya Alexander	Members at Large	<ol style="list-style-type: none"> 1. Meet with incoming Member(s) at Large and share knowledge. 	LaWanda Johnson Dharvette Barwick	Members at Large