



Leadership Transition

Below is a step-by-step guide to transitioning leadership as it relates to the LWV Member Portal.

1. Ensure that your Leadership list is correct in the portal. Anyone who is currently listed on the Leadership list in a president, vice president, treasurer, membership chair, roster manager, Stripe manager, or employee role has access to do this.

Log into the portal at portal.lwv.org. Click the name of your League in the top right and click Leadership to get to the leadership list. During a period of transition, make sure to add anyone with a new role, edit the term dates for anyone with a role that needs to be extended, and end term dates for anyone whose role is ending. If you have lost access to the admin features of the portal, it's likely that your term on the Leadership list has ended, so someone who is still listed should update this for you.

To add a new leader:

- Click the Leadership button
- On the top right, click Add Role
- On the Add Role Assignment screen, in the Contact field, begin typing the name of the person. (They should already be on the roster. If they aren't, they can be added as a Non-Member Leader using the button at the top of the screen.)
- Next, choose the role this person is in.
 - The list of roles available cannot be edited by your League, but if there are roles that are common to many Leagues, that may be able to be added to the list. If you wish to suggest a role not currently available, email membership@lwv.org.
- Finally, add the dates of the leader's term. Any elected roles with explicit terms should include the correct end date. If the role does not have a predetermined term (e.g. Webmaster), the end date can be set to a date well in the future. Do not leave the end date blank.

Note: the system will not allow you to enter two overlapping terms of the same role for the same person (e.g. adding a person a treasurer from January through June and adding them as a treasurer from May through December). If you try to enter a role and get an error message, check the All Previous League Leadership view to see if the same person was entered in the same role with overlapping dates.

To add or update end dates for existing officers or other leaders:



- On the Leadership page, click the three dots on the far right of the person's record you are updating.
- On the menu that pops up, click "Edit Term Dates."
- There you can extend a leader's term.
- Alternatively, you can choose End Role Assignment to immediately end the role, or you can choose "Replace Role Assignment" to both end one role and add a new role.

2. Add any new treasurer to the Stripe account. At any given time, your Stripe account should have at least two League leaders with access to it, so in the process of updating your leadership, make sure to maintain a minimum of two people with access.

To add a new person, log in at dashboard.stripe.com. Click the Settings gear in the upper right. Under the Account Settings heading, choose Team and Security. From there you can see the current list of individuals with access and add more with the Add Member button above the table. Enter their email address and choose either Super Administrator or Administrator.

3. Familiarize new leaders with the portal. Anyone who will be in a role with admin access to the portal for the first time should attend or watch Membership Chair/Roster Manager Training. New treasurers should attend or watch Treasurer Training, and presidents who want to be familiar with the financial aspects of the portal are encouraged to as well. New leaders who will be using the portal emailer or website editor should attend or watch Optional Tool Training.

Links to register for training/recordings and slides are available on the [Member Portal Resources Page](#) under Training. New leaders should also review the [LWV Member Portal Admin Guide](#).

4. Join or leave Groups.io. Groups.io is a platform used for League leaders to communicate, ask questions, and share best practices. There are groups for treasurers, membership chairs, communications chairs, and presidents. Incoming leaders may choose to join these groups, and outgoing leaders may choose to leave them, although they are optional and participation is not dependent upon holding a formal leadership role. More information about these groups can be found [here](#).

5. Update email addresses. There are a few places where an email address may need to be updated when leadership changes.

- Under League Profile, review the Public Contact Email, Financial Notifications Email, and Annual League Survey Contact email. You may want to change one or more of these if they are associated with former leaders.



- If your League uses role-specific for leaders (e.g. treasurer@lwv____.org), and if you want notifications from the portal to go to those emails, former leaders should log in and change the email address in their profile to their personal email, and then new leaders should log in and change their personal email to their role email.
- If your League houses Ed Fund money at the national level and your treasurer is changing, email npullen@lwv.org to change the contact email to receive quarterly statements.