**Leadership Transition Planning Checklist***Additional items may be added or changed as they pertain to your chapter.*

**President “To Do” list for incoming chapter president**\_\_\_\_ Review the job descriptions for all the chapter officers
\_\_\_\_ Be sure the Secretary has informed IHS of the new officer and chairs
\_\_\_\_ Meet with the Treasurer to handle necessary business and understand the chapter’s financial status
\_\_\_\_ Sign new financial account signature cards, if applicable
\_\_\_\_ Ensure that other officer transitions occur smoothly and in timely manor
\_\_\_\_ Copies of correspondence, bylaws and other chapter documents
\_\_\_\_ Review society’s strategic plan & chapter long range plan
\_\_\_\_ Schedule a “Summer” Chapter planning meeting
\_\_\_\_ Make necessary appointments to standing committees and/or task forces

**President-Elect/Vice President “To Do” list for incoming chapter president-elect/vice president**\_\_\_\_ Discuss duties and assignments with the chapter president
\_\_\_\_ Schedule orientation session with officers to learn about responsibilities, etc.
\_\_\_\_ Appoint or act as a liaison to the Nominating task force
\_\_\_\_ Attend the Chapter Day Training in the spring

**Secretary “To Do” list for incoming chapter secretary**\_\_\_\_ Transfer all original documents or minutes
\_\_\_\_ Transfer copies of correspondence
\_\_\_\_ Transfer Certificates of Insurance or contracts etc.

**Treasurer “To Do” list for incoming chapter treasurer** \_\_\_\_ Transfer original copies of all officer chapter financial records
 \_\_\_\_ Bank account information
 \_\_\_\_ Bank statements, annual statements etc.
 \_\_\_\_ Establish a financial management system (preferably computer based)

**Web Master “To Do” list for incoming chapter web master**\_\_\_\_ Obtain admin web master privileges from former webmaster
\_\_\_\_ Read Admin Help Guide
\_\_\_\_ Post current chapter officers with their e-mail links to site
\_\_\_\_ Post meeting dates on chapter calendar of events
 \_\_\_\_ Post monthly chapter newsletters
 \_\_\_\_ Delete old information on site and keep information current
 \_\_\_\_ Post monthly message from the president
 \_\_\_\_ Encourage members to log on to the site and participate

**Board Members “To Do” list for incoming chapter chair or board members**\_\_\_\_ Contact last year’s member and obtain any copies of correspondence that may be helpful
\_\_\_\_ Obtain and review job description
 \_\_\_\_ Obtain description of task assignments and resources available