**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