



PRESIDENT TRANSITION TO NEW BOARD CHECKLIST

Outgoing: Binder Organize and update for accuracy and completeness.

1. List of all affiliated organizations (NCAR, facilities)
2. Confirm the Calendar that has been confirmed for the new year
3. Copies of annual reports from all Board members for the president's Binder
4. Appoint committee chairmen
5. Review Annual responsibilities
6. Review Monthly responsibilities

The outgoing President should contact new Board members to congratulate them, ask if they have any questions about their position, and encourage them. The outgoing President may also contact those Board members continuing in their position to thank them for doing a great job and continuing it.

At the installation meeting, the outgoing President should thank all Board members for their service to the chapter. If the outgoing President has a notebook of procedures for the chapter, the notebook should be presented to the incoming President.

THE INCOMING PRESIDENT SHOULD:

1. Appoint a Parliamentarian, who sits on the board, but does not have voting rights.
2. Appoint Standing and Special Committee chairs. Special committee chairs do not have voting rights.
3. Review Constitution Bylaws & Standing Rules: Does either need updates? If so, establish a committee to handle this.
4. Set dates for Board meetings
5. Call meetings of old and new boards to hand off files and relevant information for each position.
6. Review (and change if necessary) all passwords for all accounts, particularly email, social media, website, banking,
7. Meet with the outgoing and the new treasurer to ascertain that all filings are current (state, local, IRS.)

NCAR



THE OUTGOING PRESIDENT:

1. May suggest the incoming President learn about parliamentary procedures.
2. Calls old and new board meetings to hand off files and relevant information for each position.
3. Transitions email forwarding from outgoing President to appropriate individual(s).
4. Sets appointments for the new president and treasurer to transfer signatories to the bank. Be sure that all appropriate accounts are transferred. Take a signed copy of the minutes stating who is incoming President and Treasurer and their responsibilities.
5. Transfer items such as keys, gavel, Chapter Book, etc., from outgoing to incoming