

SIM Chapter Leadership Transition Checklist

For incoming President:

- Review the job descriptions of all Chapter officers
- Be sure the Secretary has informed SIM Headquarters of new officers
- 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 a timely manner
- Obtain copies of correspondence, bylaws, and other Chapter documents
- Review strategic plan and long-range Chapter plan
- Schedule a summer Chapter planning meeting

For incoming 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 for task forces as needed
- Attend Chapter Summit in the Spring

For incoming Secretary:

- Transfer all original documents and minutes
- Transfer copies of correspondence
- Transfer contracts, agreements, etc.

For incoming Treasurer:

- Transfer original copies of all Chapter officer financial records
- Transfer bank account information (if necessary)
- Transfer bank statements, annual statements, etc
- Establish a financial management system

For incoming Webmaster/Marketing Chair:

- Obtain Chapter Admin rights from SIM Headquarters
- Read the YM & SIMnet Resources area
- Post current Chapter officers with their email links to site
- Post meeting dates on Chapter calendar of events
- Delete old information on site and keep information current
- Post monthly message from the President
- Encourage members to log on to SIMnet.org and participate

For incoming Directors/Trustees:

- Obtain and review job description
- Obtain description of task assignments and resources available
- Contact previous Trustees and obtain any copies of correspondence that may be helpful