

Leadership Transition Planning Checklist

# President

*“To do” list for incoming component president*

 Review the job description for all the component officers

 Be sure the Secretary has informed the ACOEM staff of the new officers, board members, delegates, and term dates

 Meet with the Treasurer to handle necessary business and understand the component’s financial status

 Sign new financial account signature cards, if applicable

 Ensure that other officer transitions occur smoothly and in timely manner

 Obtain copies of correspondence, bylaws, and other component documents

 Review the component’s strategic plan and Component’s of Excellence Program

 Schedule first component planning meeting

# President-Elect/Vice President

*“To do” list for incoming component president-elect/vice president*

 Discuss duties and assignments with the component president

 Schedule orientation session with officers to learn about responsibilities, etc.

 Appoint or act as liaison to respective task forces

# Secretary

*“To do” list for incoming component secretary*

 Transfer all original documents or minutes

 Transfer copies of insurance

 Transfer contracts, etc.

 Log in and ensure access to the ACOEM Component Dropbox with excel rosters

# Treasurer

*“To do” list for incoming component treasurer*

 Transfer original copies of all officer component financial records

 Transfer bank account information

 Transfer bank statement, annual statements, etc.

 Establish a financial management systems (preferably computer based)

 Contact ACOEM staff to transfer Bill.com component account

# Webmaster

*“To do” list for incoming component webmaster*

 Obtain admin web master privileges from previous webmaster

 Post current component officer names with email links to website and ACOEM Component Community page

 Post meeting dates and events on calendar or to the community. Submit dates to the [ACOEM Event Calendar](https://www.jotform.com/ACOEM/upcoming-events).

 Delete old information on the site and keep information current

 Post monthly message from the president

 Encourage members to log on to the site and participate

 Respond to messages posted on the ACOEM Component Community discussion board

# Board Members

*“To do” list for incoming component board members*

 Contact previous board members and obtain any copies of correspondence that may be helpful

 Obtain and review job description

 Obtain description of task assignments and resources available