**Transition Checklist**

All great things come to an end, but having a transition in place will assist the next committee leader to be prepared. For committee leaders, the following are key topics to review:

**Meetings Overview:**

-Past budgets

-Scheduled meetings for the future
**Committee Roster:**

-Updated with new and returning leaders and their contact information

-Train new leaders how to access and run reports in Personify
**Annual Goals/Events:**

 -Responsible Parties
 -Existing Contracts for Events

**Review of Programs**:

 -Budget
 -Technology Used/Needed
 -Timelines/Project Plans

**Board of Directors Involvement**:
 -Communication/Reporting with the Board of Directors
 -Budget Requests
 -Committee Alignment to Section Goals

 **Existing Contracts:**

 -Supplier Night Planners

 -Website manager

 **Other:**

 -List of past leaders that can answer questions or help out

 -Contacts of other Section Leaders that are good resources

 -And/all documents pertaining to contracts, agreements, or ongoing professional relationships and services

It is recommended to start the transition process as early as possible; incoming leaders will have questions! This will allow the two leaders to meet regularly to review key components as well as identify areas they may have missed from their initial transition meeting.

**Checklist of Items Likely Pertaining to Your Section**

## Annual Compliance Checklist

###  Tax & Legal Filing Schedule

[ ] IRS Form 990 submission

[ ] State annual report/registration

[ ] Tax exempt status verification

[ ] Copy of tax extension request (if applicable)

 Insurance Requirements

[ ] Directors & Officers Insurance renewal

[ ] General Liability Insurance review

[ ] Event Insurance (as needed)

[ ] Insurance certificates to IFT HQ

Governance Documents Review

[ ] Articles of Incorporation review

[ ] Bylaws review

[ ] Submit any proposed changes to IFT HQ

[ ] Policies and procedures manual update

## Board Transition Checklist

### Outgoing Leaders:

[ ] Transfer all Section records

[ ] Update signature cards for financial accounts

[ ] Transfer passwords/access to digital accounts

[ ] Complete outstanding reports/filings

[ ] Prepare transition memo

### Incoming Leaders:

[ ] Review governing documents

[ ] Complete leadership orientation

[ ] Register for Section Leadership Forum

[ ] Update IFT HQ contact information

[ ] Schedule strategic planning session

## IFT Section Governance Templates & Checklists

 Annual Section Leadership Transition Plan

### LEADERSHIP TRANSITION CHECKLIST

Section Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Transition Period: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### ACCESS & ACCOUNTS TRANSFER

[ ] Bank accounts & signature cards

[ ] Investment/financial accounts

[ ] Online banking credentials

[ ] Section website admin access

[ ] Social media accounts

[ ] Email accounts/listservs

[ ] Cloud storage/document repositories

[ ] Virtual meeting platform accounts

[ ] Section post office box/key

[ ] Software licenses/subscriptions

### DOCUMENTS TO TRANSFER

[ ] Current strategic plan

[ ] Current budget & financial reports

[ ] Bank statements (past 2 years)

[ ] Insurance policies

[ ] Contracts/agreements in force

[ ] Vendor contact list

[ ] Member communications archive

[ ] Event planning materials

[ ] Brand assets/logos

[ ] Standard operating procedures

### MEETINGS & TRAININGS

[ ] Schedule joint board meeting

[ ] Complete officer orientation

[ ] Review bylaws together

[ ] Review affiliation agreement

[ ] Schedule handoff meetings for each role

[ ] Plan strategic planning session

[ ] Register for IFT leadership training

### STATUS OF ONGOING PROJECTS

Project Name | Status | Key Contacts | Next Steps

----------------------------------------

1.

2.

3.

### CRITICAL DATES & DEADLINES

[ ] List all upcoming filing deadlines

[ ] List all scheduled events

[ ] List all contract renewal dates

[ ] List all report due dates

Signatures:

Outgoing President: \_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_

Incoming President: \_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_