

# Chapter Transition Checklist

Use this checklist to ensure a smooth transition between outgoing and incoming board members. Complete this during the transition period (May - June).

- Confirm incoming board roles and contact information
- Schedule a transition meeting between outgoing and incoming board
- Review key upcoming deadlines (grants, reports, elections, events)
- Share status of ongoing projects and planned events
- Transfer access to all accounts and platforms
- Ensure shared drive is organized and up to date
- Introduce new board to members (if not already done)

## Access & Information Transfer Tracker

At a minimum, this tracker should include all core platforms and resources your chapter relies on, such as:

- Shared file storage systems (e.g., Google Drive, Dropbox, or OneDrive)
- Chapter email accounts or listservs
- Communication platforms like Mailchimp or social media accounts
- Financial access points including bank accounts or payment platforms
- Membership lists or databases
- Tools used for event registration or management
- Any key documents that are not already stored in shared folders.

Use this table to list all platforms, tools, and resources your chapter relies on, and track whether access has been transferred. Feel free to add more rows as needed.

| Item/Platform | Description | Current Owner | New Owner |
|---------------|-------------|---------------|-----------|
|               |             |               |           |
|               |             |               |           |
|               |             |               |           |

## Notes / Additional Information