

BOARD TRANSITION CHECKLIST

- Meeting scheduled for transitioning board leaders
- Develop a transition plan
- Review board position description and responsibilities
- Review the chapter's mission, vision, and bylaws
- Understand the national organization's guidelines
- Learn to utilize available tools used to manage the chapter, transition all vendors with a clear understanding of their purpose, review contracts, and share experiences
- Understand the chapter's financial and programming needs
- Set goals for role and identify necessary skills needed

TIPS

1. Get to know the past and current board members as well as their committees
2. Time management – understand the importance of prioritizing and delegating
3. Have fun!



A checklist, while time-consuming and tedious, corrects human error, blind spots and overconfidence in complex situations."

— Chip Heath and Dan Heath
Switch: How to Change Things When Change Is Hard