

Club Officer Transition Checklist

Records, accounts, passwords, and knowledge transfer – stop losing club history every officer year.

Club name

Officer role

Outgoing officer

Incoming officer

Handoff date

Records and documents

- ☐ Bylaws, policies, and standing rules (current versions)
- ☐ Minutes archive – board and club meetings
- ☐ Budgets and financial reports, current and prior year
- ☐ Member roster with contact information and join dates
- ☐ Committee lists, event history, and vendor / venue contacts
- ☐ Insurance policies, contracts, and any legal documents

Accounts and access

- ☐ Bank signature cards updated (president / treasurer as bylaws require)
- ☐ Club email accounts – passwords transferred or forwarding updated
- ☐ Website admin access and domain registrar login
- ☐ Social media account access (and who posts)
- ☐ Club management software – admin roles reassigned
- ☐ Password list reviewed: every club account has two current officers with access

Knowledge transfer

- ☐ Joint meeting held: annual calendar walked through month by month
- ☐ Open commitments listed: promises made, grants pending, projects mid-flight

- ☐ Key relationships introduced: district contacts, venue managers, major sponsors
- ☐ The unwritten stuff written down: traditions, timing, what always goes wrong

Incoming officer's first 30 days

- ☐ Meet each committee chair one-on-one
- ☐ Review budget vs actuals with the treasurer
- ☐ Confirm meeting schedule, venue bookings, and program plans for the quarter
- ☐ Verify access to every account on the list above – before you need it

Tip. If this checklist feels impossible because everything lives in personal accounts and one member's head, that is the real finding – move club records into a shared system this year.