



## Leader/Officer Transition Checklist

Use this checklist to ensure that all new officers are prepared for their position and have been adequately trained to fulfill the job responsibilities required of them.

### Tips for a Successful Transition

- The new leader has been mentored by the previous leader.
- The new leader has shadowed the previous leader for at least one month.
- The new leader has attended a Protect Life Michigan Leadership Retreat.
- Outgoing leaders have scheduled “orientation meetings” with incoming leaders to orient them to their new roles.
- Outgoing officers have been thanked and recognized for their service.

### The Checklist

- All incoming and outgoing leaders have exchanged contact information.
- The incoming leader has been introduced to Protect Life Michigan’s staff, the group’s advisor, and key contacts within the administration.
- Have the outgoing and incoming leaders walk through the officer binder together, explaining policies, procedures, and how the group operates.
- The leader knows the process for registering the group each year, if applicable.
- Complete or pass on any uncompleted tasks.
- Instructions and access has been provided for the following:
  - The Google Drive
  - The email list
  - The social media accounts
  - The email account
  - Protect Life Michigan’s Student Leadership Committee Facebook group

### Share Important Documents

If possible, include the following documents in the officer binder and in electronic format.

- Mission and Vision
- Constitution and Bylaws
- Contact information from officers
- Contact information for key contacts within the administration and pro-life community
- Meeting minutes and agendas
- Event Debriefs
- History of organization
- Calendar of events
- Marketing materials (logos, photos, quotes, sample posters and flyers, etc.)
- Guide to planning events, recruiting, and fundraising (these can be downloaded at [www.protectlifemi.org](http://www.protectlifemi.org))
- Budget, financial policies, and past applications for school funding
- Officer Roles and Responsibilities

*Please feel free to make changes to this checklist in order to make it fit the needs of your group.*