

Officer transition binder

Put this page at the front of the binder. Fill each section during your term, and check it off. At the handover, walk through it page by page with the incoming officer.

ROLE		TERM	
OUTGOING OFFICER		INCOMING OFFICER	
OVERLAP STARTS		OVERLAP ENDS (ABOUT 90 DAYS)	

SECTIONS

	SECTION	WHAT GOES IN IT	LAST UPDATED
☐	Role summary	One page: what this officer does each month and each year.	
☐	Annual calendar	Every filing, renewal, report, and recurring event, with dates.	
☐	Contracts	Vendors, facility rentals, sponsor agreements, each with its end date.	
☐	Procedures	How dues, reimbursements, event approvals, and sign-ups work, step by step.	
☐	Financial history	Two years of budgets, year-end balances, and tax filings.	
☐	Contacts	People outside the club you call, and what you call them about.	
☐	Access log	Every account and key, who holds it, and when it was transferred.	
☐	Open items	Anything unfinished, promised, or at risk.	
☐	Lessons	Answers to the four handover questions below.	

HANDOVER QUESTIONS

1. What did you try that didn't work, and why?
2. What did you start that isn't finished?
3. What are you worried about that hasn't happened yet?
4. Who outside the club do you rely on, and what do they need from us?

HANDOVER SIGN-OFF

EVERY ACCOUNT AND KEY TRANSFERRED	☐	BANK SIGNERS CHANGED	☐
PARTNERS INTRODUCED TO THE NEW OFFICER	☐	BINDER WALKED THROUGH TOGETHER	☐

Outgoing officer

Date

Incoming officer

Date