



Harvard Law School Association



Club/SIG Officer Transition Checklist

This checklist suggests processes that ensure a transfer of knowledge from one HLSA volunteer to the next so that the intuitional knowledge and operational information developed over time by a Club/SIG is transferred to succeeding Club/SIG Officers.

Outgoing Club/SIG Officer's Transition Checklist

- **Introduce the new Club/SIG President to the HLSA President & HLS Alumni Relations Staff**
- **Complete the Volunteer Leadership Form ([link](#)) to inform the HLS Alumni Relations staff of new and outgoing Club/SIG Officers**
 - This ensures the new volunteers receive communications and access to AlumniMagnet
- **Disclose Club/SIG financial information**
 - Ensure the newly elected Treasurer has bank account details and access
 - Share with the incoming Club/SIG Officers the organization's tax-exempt status and provide all financial documentation
- **Provide logs and passwords for all organizational accounts and update access/admin rights, as needed.** This includes:
 - Email and social media channels
 - Zoom or online meeting platforms
 - Banking/e-commerce platform
- **Encourage outgoing Club/SIG Officers to meet with their newly elected counterparts to share information**
 - All key documents, such as bylaws, articles for incorporation, account passwords, etc., must be shared with the new Club/SIG Officers
 - Discuss institutional knowledge and memories
 - For example, mission and history of the Club/SIG, details related to past and future events, the Club/SIG's successes and lessons learned, relevant anecdotes, key contacts

Incoming Club/SIG Officer's Transition Checklist

- **The newly elected Club/SIG President schedules an introductory call with the HLSA President and/or HLS Alumni Relations Staff**
 - Following the introduction, the HLS Alumni Relations Staff will include the President on the HLSA Club/SIG Presidents email listserv (hlsapresidents@lists.law.harvard.edu) and receive invitations to the HLSA Club/SIG bi-monthly Presidents calls
- **The Web Administrator/Technology Chair/or Secretary schedules training on the AlumniMagnet platform (the Club/SIGs website and email communication tool)**
 - Following the training:
 - The HLS Alumni Relations Staff will provide the Technology Chair access to the AlumniMagnet platform and the GoogleSuite
- **All Club/SIG Officers should familiarize themselves with the HLSA Club/SIG Resources, especially the following:**
 - [Operating Guidelines](#)
 - [Partnership & Fundraising Guidelines](#)
 - [HU & HLS Logo and Trademark Guidelines](#)
 - [Allocation Model for HLSA Club/SIGs](#)
- **Get familiar with the HLSA and all of its geographic Clubs and SIG organizations**
- **Introduce the new Club/SIG Officers to your alumni community**
 - Update the Officers/Board page on your AlumniMagnet website
 - Introduce the incoming volunteer leaders in a newsletter (email) or social media posts