

## 7 Steps to Seamless Transitions

*Encourage succession through well-organized planning*

Item #	Check Off	Action	Notes
1	<input type="checkbox"/>	Make recruitment an ongoing process: tap your current volunteers for interest and leadership potential. <i>*TIP: share info about upcoming opportunities with your membership.</i>	
2	<input type="checkbox"/>	Identify board gaps or positions that expire at the end of board terms.	
3	<input type="checkbox"/>	Develop an opportunity description for each position. <i>*TIP: List out challenges and areas for growth to help frame the roles.</i>	
4	<input type="checkbox"/>	Invite incoming board members to observe a board meeting. <i>*TIP: Assign a "Meeting Buddy" to help put them at ease.</i>	
5	<input type="checkbox"/>	Schedule a transition meeting for the new recruit and current role holder or board chair, prior to turnover.	
6	<input type="checkbox"/>	Organize orientation and training. <i>*TIP: Plan ahead to ensure a well-run meeting and updated board binder.</i>	
7	<input type="checkbox"/>	Assign a mentor to check in regularly with new board members and follow up on any questions.	