

40 things to give next year's board

A checklist for the outgoing board, grouped so it can be worked through in an evening. Most handoffs pass on the folder and lose the knowledge: the logins, the lead times, the vendor who needs three weeks notice. This list is the knowledge.

Tick each one when it has been handed over, not when it has been found.

1 Accounts and access

- ☐ 1 The bank account, every current signer, and the steps to change them
- ☐ 2 The payment or donation platform login, and whose bank account it pays into
- ☐ 3 The role's shared email address and phone number, the ones the [school / church / district / parent organization] has on file, and not anyone's personal inbox
- ☐ 4 Every social media account, with the login and the recovery email and phone number on each
- ☐ 5 The website: where the domain is registered, when it renews, and which card pays for it
- ☐ 6 Every other auto-renewing subscription, its renewal date, and the card it charges
- ☐ 7 A list of who comes off each account above, and the date they were removed

2 Money

- ☐ 8 Last year's budget, with actual against planned for each line
- ☐ 9 What each fundraiser netted after costs, not what it grossed
- ☐ 10 Current balances, plus anything owed to you or by you: unpaid invoices, unpaid dues, pending reimbursements
- ☐ 11 The tax filing status, the last return, who prepared it, and the organization's tax ID
- ☐ 12 The reimbursement process, written down: which form, who approves it, how long it takes
- ☐ 13 Who can spend without a vote, and up to how much
- ☐ 14 Dues, fees or payment amounts, when they are collected, and who has not paid yet

3 People

- ☐ 15 The member or family roster, with contacts that still work and a note on which ones are out of date
- ☐ 16 The three people who quietly do the most, and what each of them does
- ☐ 17 Who volunteered last year, and for what
- ☐ 18 Who said no last year, and why, if they told you
- ☐ 19 Vendor contacts with a person's name on them, not just a company
- ☐ 20 Your contact at the [school / church / district / parent organization], and what they need from you and by when
- ☐ 21 Anything open with a member: a complaint in progress, a promise made, a refund pending

4 The calendar

- ☐ 22 Every date from last year, with how many people actually came
- ☐ 23 The dates that are fixed for you by the [school year / season / parent organization]
- ☐ 24 The lead times: when ordering, booking or printing had to happen for each event
- ☐ 25 The deadlines that are not events: filings, insurance renewals, grant reports, room bookings
- ☐ 26 The event that always runs late, and why
- ☐ 27 The event that is not worth running again, and why
- ☐ 28 The first three things the new board has to do, with dates

5 How things actually work

- ☐ 29 The run sheet for the biggest event: who does what, in what order
- ☐ 30 Where the equipment is kept, and who has the key or the code
- ☐ 31 Anything broken, borrowed, or owed back to someone
- ☐ 32 The rules the parent organization sets: which forms, which approvals, what needs signing off

- ☐ 33 The insurance: what it covers, and specifically what it does not
- ☐ 34 The bylaws, and which parts actually get used
- ☐ 35 The templates you already have: the reminder, the volunteer ask, the welcome email, the sponsor letter



The honest notes

Numbers 36 to 40 never get written down. They are the difference between a board that starts in September and one that starts over.

- ☐ 36 What went wrong this year, plainly
- ☐ 37 What you would do differently
- ☐ 38 The decision you regret
- ☐ 39 The thing that worked that nobody expected
- ☐ 40 Who to call when something goes sideways

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