

YALSA Chair & Team Lead Transition Checklist

Item or Activity

Person

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Assign Liaisons to member group	President-Elect	Incoming Chair/Team Lead	Board Liaisons change annually July 1st. The President-Elect completes this in June and posts it online in the Contact Us section of the web site. If you cycle on to your member group after Midwinter, check online for your Board Liaison. Please note: selected list teams and book award committees do not have a Board Liaison, but instead are supported by the Selected List & Award Committees Oversight Committee	

Prepare group materials for the next committee. Member group records/notes, should include:

- Significant communications, such as emails
- Activity reports & summaries, if applicable
- Quarterly chair reports
- URLs and log in information for all online work spaces & resources, including listservs, YALSA wiki pages and ALA Connect
- Publicity materials, including press releases, fliers, etc.
- Summary of recently completed projects
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<p>so on.</p> <ul style="list-style-type: none"> • Copies of forms or other information regarding activities like proposed or planned conference or symposium programs • Copies of templates, forms, evaluation criteria, etc. used for vetting any member grants, contests, etc. • Important dates &/or a timeline outlining regular responsibilities and deadlines • Other information as appropriate 				
Summary of ongoing member group projects or tasks that are in progress	Outgoing Chair/Team Lead	Incoming Chair/Team Lead	Outgoing Chairs/Team Leads need to pass this information to the in-coming leader just prior to or at the conference where their term is ending	
Complete training	Incoming Chair/Team Lead	Incoming Chair/Team Lead	Participate in virtual training. Notice about this will come from YALSA staff via email	
Board directives for the member group (e.g. Organizational Plan initiatives, new projects, etc.).	Board Liaison or YALSA President	Out-going and Incoming Chair/Team Lead	For Strategic Committees and Advisory Boards, the Board Liaison may be in touch to get feedback that will be used by the Board to inform decision making. This may happen by phone or email. As Board decisions are made throughout the year, the Board Liaison may come to the current chair/team lead with new tasks or projects.	
Quarterly Reports (due Aug. 15, Nov. 15, Feb. 15 and May 15)	out-going chair and in-coming	YALSA Board &	For strategic committees and advisory boards: the May 15 quarterly report should	

	chair	Selected List and Awards Oversight Committee	be completed by the out-going chair, but shared with the in-coming one. The Aug. 15 quarterly report should be completed by the new chair For award committees: the Feb. 15 report should be completed by the out-going chair, but shared with the in-coming one	
Begin group work	Incoming Chair/Team Lead	Member group	As soon as the term of your appointment is official, and you have discussed ongoing tasks with the outgoing chair as well as any new ones with your Board Liaison or Oversight Committee, contact your group and develop a work plan for what your group will accomplish in the coming year. You may want to divide the work plan into quarterly sections that coincide with when you turn in quarterly reports to the board (Aug. 15, Nov. 15, Feb. 15, May 15)	