



# Incoming Leadership Checklist

## A Guide for Ontario Council Club Executive Teams

Welcome to your new leadership role! To support a seamless transition and set your club up success, the Ontario Council has prepared this checklist.

## A Note on Flexibility & Mentorship

- **Adapt to Your Model:** every club has a unique governance structure — feel free to adapt roles and timelines to fit your club's needs, ensuring coverage for vacations and holidays.
- **Not all Clubs have a late spring/early summer year end:** Ontario Council recognizes the variation in clubs' year-ends. Adapt your calendar accordingly. However, some metrics must be provided by specific dates to Ontario Council to ensure insurance coverage and dues payments — adhere to these dates.
- **Passing the Torch:** outgoing executive members are highly encouraged to remain available to support, mentor, and cheer on the incoming team during this transition period.

## Phase 1: Immediate Actions & Administrative Handover

*Complete these tasks as soon as possible following your club elections.*

- **Convene a Turnover/Crossover meeting (Immediate):** Bring the old and the new Executive together to transfer role knowledge and documentation. Gather all physical and digital files, archives, and key club documents from the outgoing executive and provide to the new executive.
- **Submit Club Officer Contacts (Immediate):** Send the names and contact details of your new President/leadership Team, Treasurer, and Secretary (if applicable) to the **OC Secretary** to ensure uninterrupted communication.
- **Update National Membership Database** Update your executive roster on <https://members.cfuw.org/MIC/Login>

- *Note: The login is specific to each executive member, contact Member Services at [memberservices@cfuw-fcfdu.ca](mailto:memberservices@cfuw-fcfdu.ca) for assistance.*
- **Address Board Vacancies:** If any executive roles remain vacant, collaborate with the board to arrange temporary coverage or actively recruit members to step in.

## Phase 2: Financial & Operational Handover

Secure your club's operational assets and set up the new committee chairs.

- **Financial Snapshot & Signing Authority:** Convene a separate joint meeting with the outgoing and incoming Treasurers.
  - Review current ledgers, financial records, and chequebooks.
  - Update bank signing officers according to your club's Constitution and By-Laws.
- **Membership Transition:** Convene a separate joint meeting with the outgoing and incoming Membership Chairs to review current enrollment numbers and discuss ongoing recruitment and retention strategies.
- **Insurance Verification:** Confirm that your club has received the annual Insurance Certificate, [a downloadable PDF file available here:](#) or email the [OC treasurer here:](#)

## Phase 3: Strategic Planning & Programming

*Align your team and design the year ahead.*

- **First Executive Meeting:** Meet with the incoming executive to:
  - Set executive meeting dates for the year.
  - Review the club's Constitution and By-Laws so all members are aligned on governance rules.
  - Review and populate the master calendar with known events.
- **Program and Event Curation:** Meet with the Program Committee to finalize guest speakers and special events for the year.
- **Public Relations & Communications:**
  - If your Club produces one, compile and distribute the **Program Brochure** to all members.

- Update the **Club Website** with new executive contact info, convener updates, and the upcoming program schedule.
- Draft welcome messages and introductory info for your **September Newsletter or eBlast**.
- **Growth & Advocacy Strategy:** Establish clear plans for:
  - Attracting new members and retaining existing ones.
  - Promoting your club within the local community.
  - Identifying key advocacy initiatives for the upcoming year.

## Phase 4: Provincial (OC) & National Connection

*Stay connected to the broader CFUW community.*

- **Connect with Your Regional Director (RD):** Your RD is your vital link to the CFUW Ontario Council and National office. Schedule a check-in meeting and invite her to an upcoming club event.
- **Plan for AGMs:** Check your budget to arrange representation for upcoming Annual General Meetings. Note: Both National and Ontario Council have in person AGMs in even numbered years and virtual AGMS in odd numbered years:
  - **Ontario Council AGM** (Typically in May)
  - **National AGM** (Typically in July)
  - *Note: If your club cannot send a delegate to an in-person AGM, ensure you submit your proxy to your RD. For virtual attendance guidelines, consult your RD.*
- **OC Speaker Series and OC Seminars:** encourage your Executive and members to attend the OC Speakers Series (October, November, February and March) and any seminars presented by OC.