📋 The Chapter President's Checklist

Christ Child Society | Actionable Guide for Chapter Leadership & Transitions

🟢 Phase 1: The Transition & Onboarding (First 30–90 Days)

Setting a firm foundation, securing digital assets, and mastering national timelines.

- [ ] **The Presidential Handover Meeting:** Meet with the outgoing President to review the **"First 30/90 Days Checklist"** and transfer master binders/digital folders.
- [ ] **The "Status of Goals" Audit:** Don't just take a verbal update. Review the current Strategic Plan's goal status to explicitly decide which initiatives to **finish, pivot, or pause**.
- [ ] **Centralized Document Vault Access:** Establish or gain access to the chapter's central digital drive (Google Drive/Dropbox) containing:
    - [ ] Official NCCS Chapter Guide & National Bylaws
    - [ ] Local Bylaws & Articles of Incorporation
    - [ ] 501(c)(3) Tax-Exempt Determination Letter (current within 12 months) & EIN
    - [ ] Official logos and branding assets
- [ ] **Financial & Digital Security Transfer:**
    - [ ] Update authorized signers at the bank with the Treasurer.
    - [ ] Hand over password management protocols for chapter software, email, and social accounts.
    - [ ] Confirm state filings, tax deadlines, and insurance policy expiration dates.
- [ ] **National Timelines Calendar:** Download the National Office Master Calendar and pre-populate key deadlines (ACR, convention milestones, roster updates).

🔵 Phase 2: Strategic Planning & Board Alignment (Months 2–3)

Aligning board roles, setting the annual calendar, and activating volunteers.

- [ ] **Board Orientation Session:** Conduct a structured orientation using a standard onboarding deck to establish clear job descriptions, expectations, and meeting norms.
- [ ] **Annual Master Schedule:** Map out all board meeting dates, general membership meetings, and major annual events for the full term.
- [ ] **Meeting Efficiency Protocol:** Establish a clear agenda template to keep board meetings focused, collaborative, and action-oriented.
- [ ] **Governance & Bylaws Review:** Review local bylaws and update committee chair job descriptions.
- [ ] **Micro-Volunteering & Recruitment Plan:** Define targeted 30-minute to 1-hour micro-roles to recruit busy parents and younger members without creating volunteer burnout.
- [ ] **Compliance Guardrails Check:** Review D&O and Liability insurance policies to confirm coverage is up to date.

🟡 Phase 3: Ongoing Governance & Program Evaluation (Mid-Term Rhythm)

Maintaining operational health and evaluating program impact.

- [ ] **Annual Program ROI Evaluation:** Run a 1–2-page evaluation rubric across all chapter programs to measure:
    - [ ] Alignment with Mary Virginia Merrick's core mission
    - [ ] Total children served vs. volunteer hours and dollars invested
    - [ ] Operational sustainability (Keep, Expand, or Sunset)
- [ ] **Financial Pulse Oversight:** Preside at board meetings and review monthly vs. prior-year financial statements and budget health with the Treasurer.
- [ ] **Minutes & Action Item Review:** Confirm that board minutes clearly capture decisions, policy changes, and assigned owners to support accountability.
- [ ] **Volunteer Activation Check-In:** Conduct informal check-ins with committee chairs to ensure volunteers feel seen, supported, and engaged.
- [ ] **Tax & Regulatory Filing:** Verify timely filing of **Form 990**. *Due date:* _____

🔴 Phase 4: National Reporting & Legacy Succession (Closing the Term)

Fulfilling national commitments and preparing your successor.

- [ ] **Annual Chapter Report (ACR):** Complete and submit the ACR to the NCCS National Office by the designated deadline.
- [ ] **National Membership Roster Update:** Submit updated membership rosters and dues to NCCS *(Mid-January Deadline)*.
- [ ] **NCCS Convention Delegates:** Appoint and register voting delegates for the Annual NCCS Convention *(Reminder: Bring a Layette on even-numbered years)*.
- [ ] **Successor Transition Preparation:** Build the incoming President's transition kit, compile password lists, and schedule 1-on-1 handoff sessions 60 days before the term ends.

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