

## TIMELINE

### *End of year - PRIOR to transition*

Before Annual Meeting (AM) if possible or immediately afterwards:

- Old board and new board meet to pencil in plans for following year.
  - Budget created for presentation at the AM
  - Calendar created for presentation at the AM

Note: In the case of a meeting AFTER the AM, the prior board will have to create a rough budget and calendar for approval. After the meeting, a transition meeting should take place to create and amended budget and calendar with full input from the new board, and approval from the new D.C.

- Incoming officers should all be given the link to the DC Guide. Incoming DC should be given a club copy of the DC Guide to read prior to taking on his/her responsibilities.
- Each/any new offer should be given the link to the DC Resource Page.
- Outgoing DC should show the incoming DC the secure Pony Club site, and explain the information available.
- Discussion/question & answer time about responsibilities should occur.
- Decisions made about which officers should be put on the checking account for the following year.
- Club and regional policies should be made available to the new officers.
- Any club guidelines should be made available to the new officers.
- Website privileges, digest groups, club email etc., should all be discussed/planned/explained.
- Financial audit should be arranged and scheduled to take place in January. This audit should take place whenever treasurer our DC roles are changing.
- New DC should join the DC Digest (don't wait until January!).
- New Treasurer should be shown the Treasurer resource page & join the Treasurer Digest (don't wait until January!).
- Outgoing and incoming DC should both attend the fall regional meeting.
- Arrangements should be made for club property to be turned over as necessary/appropriate.
- A listing of all club belongings and their location should be made and given to the incoming DC (note: this should be part of the treasurer's financial report, but it is recommended that the incoming DC have this information as soon as he/she takes office).
- Incoming DC watches DC Orientation at <http://www.ponyclub.org/?page=DC>
- Incoming DC knows how to add locations for insurance
- Incoming DC has read HM rulebook on proper fitting of helmets and understands medical armband/bracelet requirements

### *New Year Checklist - AFTER transition (January)*

- Checking accounts changed over to reflect new leadership.
- Audit scheduled.

- First board meeting held. Suggest request past DC to be in attendance as advisor if not in a different leadership role.
  - Reiteration of roles for upcoming year.
  - Explanation of calendar, discussion of responsibilities for each event noted.
- All website, email, digest privileges should be turned over to incoming board.
- New DC checks access to secure site, ensures has all contact information as necessary.

## **NEW YEAR CHECKLIST**

- New officers joined appropriate Digest (treasurer, DC, HMX, etc.)
- New officers have availability to club funds.
- New DC has a checkbook.
- New officers have been shown secure pony club site and have been trained on how to access information.
- New officers have access to all website/email/digest passwords etc.
- Past officers no longer have access to club funds.
- Financial audit accomplished.
- Club property all accounted for. New leadership has complete records.