Board handover checklist

A checklist for a departing and an incoming officer to walk through together

GUIDE · VERSION 1.0 · 2026-11-09

Use this checklist when an officer leaves and another takes over, so a club, registry or association keeps running when the people change. The departing officer says what they hold. The incoming officer writes it down, checks it exists, and signs the last page.

> **A planning aid, not legal advice.**
> This checklist is a planning aid. It does not say what the law or your governing documents require. Check your bylaws, your registry's rules and any advice you rely on before you act.

How to use this checklist

Print it or copy it, and work through it in one sitting if you can. Anything neither of you can find goes on the open items list at the end, with a name and a date. Allow time for the logins. Most handovers stall on an account that only one person can open.

Accounts and logins to transfer

Move each account to the club, not to a person. Where an account only allows one holder, change the holder. Where it allows several, add the incoming officer first and remove the departing one last.

- ☐ Club email address and any shared mailboxes
- ☐ Website, hosting and the domain name registration
- ☐ Payment accounts: bank, card or online payment provider
- ☐ Accounting and bookkeeping files
- ☐ Membership, registration and event records, wherever they are kept
- ☐ Social media pages and any scheduling tools
- ☐ File storage and shared folders
- ☐ Mailing list or newsletter tool
- ☐ Video call, ticketing or form accounts
- ☐ Any software subscription paid on a personal card

Do not hand over a personal password in an email. Add the new officer as a separate user, or move the account to the club's own address, and record who holds access in your register of who holds what.

Records and registry data to hand over

For each item, write where it lives and who can open it. A record nobody can find is a gap, so list it under open items.

- [ ] Current member list with status, renewal dates and contact details
- [ ] Open and recently decided membership applications
- [ ] Dues and fee records, receipts and refund requests in progress
- [ ] Registration records, certificate numbers and the numbering rule you follow
- [ ] Transfers and corrections waiting for a decision
- [ ] Event entries, results and prize or award records
- [ ] Minutes and decisions of the board, and the current bylaws and rules
- [ ] Contracts, venue bookings and insurance papers
- [ ] Financial statements and the last reconciliation

Open obligations and dates

Put every date in one list the whole board can see, with the person responsible.

- [ ] Renewal dates: domain name, hosting, insurance, software, venue deposits
- [ ] Regular reports or filings your club prepares, and when they are next due
- [ ] Meetings and elections already scheduled
- [ ] Promises made to members, vendors or officials that are not finished
- [ ] Money owed to the club and money the club owes
- [ ] Applications, registrations or refunds that are half done

Who to notify

- [ ] Members: who the new officer is and how to reach them
- [ ] Your registry or parent organization, if you have one
- [ ] Your bank and payment provider
- [ ] Your insurer
- [ ] Hosting, domain and software providers
- [ ] Venues and other vendors with open bookings
- [ ] The people who send you regular mail or payments

Sign-off

Role handed over: _____

Departing officer: _____ **Date:** _____

Incoming officer: _____ **Date:** _____

A second board member who saw the handover: **Date:** _____

Open items

Item: _____ **Who will find or fix it:** _____ **By when:** _____

Item: _____ **Who will find or fix it:** _____ **By when:** _____

Item: _____ **Who will find or fix it:** _____ **By when:** _____

After the handover

In the first month, check that the new officer can open every account without help, and that the departing officer no longer has access they do not need. Update your register of who holds what and your emergency access plan.

How Breed Ledger handles this

How Breed Ledger fits into a handover.

Everything above works with whatever your club uses today. If your club runs on Breed Ledger, these parts are already handled.

- An organization administrator can give an active member the member, registrar or organization administrator role, and can change it again later. Moving the last organization administrator to another role is refused, so a handover starts by giving someone else the administrator role.
- When an administrator changes the role of a member who has an account to a different role, that member gets an email that names the new role and links to the sign-in page.

See a handover in Breed Ledger: book a demo at https://breedledger.co/demo.