

YALSA Chair & Team Lead Transition Checklist

| Item or Activity | Person Responsible for Dissemination | Recipient | What/When | Complete? |
|--|--------------------------------------|--------------------------|---|-----------|
| Complete chair/team lead preparation | Incoming chair/team lead | Incoming Chair/Team Lead | <ul style="list-style-type: none"> ○ Review online YALSA Handbook, especially the Policy & Chairs sections, and other member group resources prior to the start of your term. ○ Read the Chair Manual to find tips and resources to help you manage the work of the group in a virtual environment ○ Read the Committee FAQ ○ Participate in any virtual training that takes place after you've accepted the appointment. | |
| Subscribe to chairs@lists.ala.org listserv | YALSA Membership Coordinator | Incoming Chair/Team Lead | The Membership Coordinator will subscribe you to this list a few weeks prior to your appointment. Staff and the President will use this list to share important information with you, and you can use it to connect with other leaders for ideas, advice, etc. | |
| Incoming member group roster | YALSA Membership Coordinator | Incoming Chair/Team Lead | By email approximately 2 weeks before your term begins | |
| Contact group members and introduce yourself | Incoming chair | Group members | Once you have received a roster from the Membership Coordinator, contact the individuals on the roster, let them know you are the new Chair/Team Lead and introduce yourself. Do this before the term officially begins. The group members have no other way of knowing who their Chair/Team Lead | |

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| | | | is. | |
| 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 | |
| <p>Prepare group materials for the next committee. Member group records/notes, should include:</p> <ul style="list-style-type: none"> • 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 • Evaluations of committee work, e.g. conference program evaluations, information sent by President or Board Liaison to the Chair/Team Lead, and | Outgoing Chair/Team Lead | Incoming Chair/Team Lead | Outgoing Chairs/Team Leads need to pass this information to the in-coming Chairs/Team Leads just prior to the end of their term. This information must be archived in the group's space in ALA Connect so that it can be easily passed from one iteration of the group to the next. Be sure to specify what content can be found in the group's space in ALA Connect (http://connect.ala.org/) and how it's organized. Before handing the space over to the new Chairs/Team Leads, clean out any obsolete documents or communications that you know for certain will not be used any longer. | |

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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 | |

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| | 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) | |