**Transition Documents & Templates [Insert Position Title Here]**

**Name:**

**Email:**

**Cell #:**

**Duties of the Position:**

* *Could list these out with brief descriptions of each responsibility, or could list the responsibilities month by month.*
	+ *Example:*
		- *August:*
			* *Send out welcome email*
			* *Gather contact information for new members*
		- *September:*
* *If you have email templates that you used for your position, including them here under the corresponding activity would make for easier navigation.*

**Account Logins & Passwords:**

**Important Contacts (include name/position or title/email/phone/and what events we collaborated on):**

* *If your position requires collaboration with other clubs, advisors, or members, including their best form of contact makes transition much easier!*

**What did you do that worked well, with respect to performing the position? / Ideas for this past year that worked well.**

* *List out the websites you found helpful, or if there were certain aspects of your position*

that required advanced planning. This knowledge can be very beneficial to someone who has never been on an exec team before!

**What do you wish you would’ve known before? /Ideas for this past year that did not work.**

**Words of wisdom for the incoming position.**

* *Leaving a piece of encouragement can go a long way for someone just starting out!*

**[Insert Position Title Here] Year in Review:**

{This template might be best used for a position where you had monthly responsibilities.

Examples include, positions where you are in charge of posting things certain months in respect to awareness, or positions that involve a lot of time management. This template can also be

added to any template above as a way to summarize the year in a more concise, list-wise fashion.}

**June: July: August:**

**September: October:**

**November: December: January:**

**February:**

**March:**

**April:**

**May:**

**Budget/Treasurer Template:**

This is a suggested template intended for the treasurer or budget management for your chapter.

This will provide a general outline as to the position roles and responsibilities and important

information. A suggested budget management template will also be provided to accompany this document.

**Important information:**

Here is a great place to provide important bank account information, login information, tax- exempt numbers, account numbers, important contacts etc. that the new executive member will need to have to take over the position.

* Bank account information:

o

* Login information:

o

* Important contacts:

o

* Tax-exempt number:

o

**First Priorities after Taking Office:**

These are the very first things that need to take place when the member steps into the role. Things like transferring ownership of the bank account, making sure they can login to the appropriate accounts and have owner access, setting the budget for the upcoming year, and making a reimbursement form for chapter charges.

**Daily Responsibilities:**

Manage budget, update payments and reimbursement, etc.

**Deadlines:**

Included here could be specific information regarding deadlines for when budget approvals,

payments, or any general things throughout the year must be submitted. It is a great way to keep organized with the many things that could be going on.

**Monthly Breakdown:**

June:

July:

August:

September:

October:

November:

December:

January:

February:

March:

April:

May:

**Budget Template with Formulas:**

[Budget Template](https://docs.google.com/spreadsheets/d/1sUH_WoIxlNsaeMK0nJUXI4XO_BBzOu9vS8a05p3v2rY/edit?usp=sharing)

**Competition Schedule Template:**

This is a suggested template for planning a competition. For most SSHP chapters, this will be the Clinical Skills Competition, so that is what this template is based upon. However, if your chapter hosts a different competition, you can utilize this template to aid in scheduling day-of events,

editing as needed. From prior experience, it is recommended that the organizer of the contest fill in the room numbers to alleviate any confusion.

|  |
| --- |
| **{Insert Date of Event Here}** |
| **{Insert Event Name Here}** |
| **Time** | **Team Member 1** | **Team Member 2** | **Start Time** | **Stop Time** | **Contestant Room** | **Judge Room** | **Presentation Time****Recording Start** | **Presentation Time****Recording Stop** |
| 7:00 |  |  | 7:00 | 9:00 |  |  | 8:55 | 9:20 |
| 7:00 |  |  | 7:00 | 9:00 |  |  | 8:55 | 9:20 |
| 7:45 |  |  | 7:45 | 9:45 |  |  | 9:40 | 10:05 |
| 7:45 |  |  | 7:45 | 9:45 |  |  | 9:40 | 10:05 |
| 8:30 |  |  | 8:30 | 10:30 |  |  | 10:25 | 10:50 |
| 8:30 |  |  | 8:30 | 10:30 |  |  | 10:25 | 10:50 |
| JUDGES LUNCH BREAK |
| JUDGES LUNCH BREAK |
| 10:45 |  |  | 10:45 | 12:45 |  |  | 12:40 | 1:05 |
| 10:45 |  |  | 10:45 | 12:45 |  |  | 12:40 | 1:05 |
| 12:15 |  |  | 12:15 | 2:15 |  |  | 2:10 | 2:35 |
| 12:15 |  |  | 12:15 | 2:15 |  |  | 2:10 | 2:35 |
| 1:00 |  |  | 1:00 | 3:00 |  |  | 2:50 | 3:15 |
| 1:00 |  |  | 1:00 | 3:00 |  |  | 2:50 | 3:15 |
| 1:45 |  |  | 1:45 | 3:45 |  |  | 3:35 | 4:00 |
| 1:45 |  |  | 1:45 | 3:45 |  |  | 3:35 | 4:00 |