

Outgoing Manager Transition Checklist

O'ahu Central Office Manager Handoff

Use this checklist during one or more transition meetings with the outgoing manager. The goal is to leave with access, documentation, contacts, calendars, procedures, and known issues fully understood.

1. Office Operations

Daily Operations

- Review daily office opening/closing procedures
- Review office hours and coverage expectations
- Review typical daily workflow
- Review recurring weekly and monthly tasks
- Discuss current operational challenges
- Identify upcoming deadlines or special projects

Physical Office

- Obtain all keys, alarm codes, and access cards
 - Review security procedures
 - Inventory office equipment
 - Inventory office supplies
 - Review storage and archive locations
 - Discuss maintenance vendors and service contracts
-

2. Volunteers

Volunteer Management

- Obtain current volunteer roster
- Review volunteer scheduling process
- Review Volunteer Training Binder
- Meet key volunteers
- Understand volunteer recruitment process
- Review volunteer communication methods
- Identify volunteer vacancies or coverage concerns

Phone Angels & 12th Step Volunteers

- Review Phone Angel schedule
 - Review 12th Step volunteer lists
 - Understand call routing procedures
 - Review emergency coverage process
 - Confirm district contact information
-

3. Technology & Access

Google Workspace

- Obtain administrative access
- Review Google Drive structure
- Review shared folders
- Review email groups and distribution lists
- Review document retention practices

Website (WordPress)

- Obtain administrator credentials
- Review hosting information
- Review domain registration information
- Review website update procedures
- Review meeting listing update process
- Review event posting procedures
- Review online contribution process
- Review literature order fulfillment process

Phone Systems

- Obtain eVoice login
- Review call forwarding setup
- Review volunteer routing procedures
- Review voicemail access
- Test all forwarding functions

Other Systems

- Gather all usernames and passwords
- Review password storage procedures
- Review backup procedures
- Review software subscriptions
- Review renewal dates

4. Financial Management

Banking

- Review bank accounts
- Review authorized signers
- Review deposit process
- Review monthly reconciliation process
- Review relationship with bank representative

QuickBooks Online

- Obtain admin access

- Review chart of accounts
- Review recurring transactions
- Review contribution tracking
- Review literature sales tracking
- Review monthly reports
- Review financial statement preparation process

Online Payments

- Review PayPal administration
- Review Stripe administration
- Review WP Give administration
- Review reconciliation procedures
- Review merchant fee tracking

Tax & Compliance

- Review tax filing calendar
- Identify tax preparer contact
- Locate prior tax returns
- Review compliance deadlines
- Review document retention requirements

5. Literature Operations

Inventory

- Review inventory procedures
- Complete physical inventory walkthrough
- Review reorder points
- Review supplier ordering process
- Review literature pricing structure

Vendors

- Obtain vendor contact list
- Understand ordering schedules
- Review outstanding orders
- Review purchasing procedures

Online Orders

- Review order fulfillment process
- Review shipping procedures
- Review customer communication templates

6. Meetings & Communications

Meeting Directory

- Review process for adding meetings
- Review process for updating meetings
- Review process for removing meetings
- Review print schedule production

Communications

- Review newsletter process
- Review announcement procedures
- Review email distribution lists
- Review social media or public communications

7. Committees & Governance

Leadership Contacts

- Meet OIG Officers
- Meet Steering Committee members
- Meet key committee chairs
- Obtain current organization chart

Governance

- Review By-Laws
- Review Structures & Guidelines
- Review Financial Policies
- Review Website Policies
- Review approval authorities
- Review decision-making processes

Meetings

- Review committee meeting calendar
- Review recurring reports required
- Review meeting preparation responsibilities

8. Community & Public Relations

External Contacts

- Review key community partners
- Review hospitals and treatment center contacts
- Review professional referral contacts
- Review media inquiry procedures

Standard Responses

- Review frequently asked questions
- Review approved public information messaging
- Review inquiries requiring escalation

9. Documentation & Records

Important Documents

- Obtain location of all governing documents
- Obtain vendor contracts
- Obtain insurance information
- Obtain tax records
- Obtain historical reports

Archives

- Review archive organization
- Review archive storage location
- Review digitized records

10. Final Transition Questions

Ask the outgoing manager:

Risks & Concerns

- What keeps you awake at night about this role?
- What issues need immediate attention?
- What recurring problems should I expect?

Success Factors

- What are the most important monthly tasks?
- Which relationships are most critical?
- What mistakes should I avoid?
- What would make someone successful in this role?

Future Planning

- Upcoming events in next 90 days
- Pending decisions awaiting action
- Outstanding volunteer or staffing issues
- Major vendor or technology concerns

Before the Outgoing Manager Leaves

- Change ownership/admin rights on all systems
- Verify access to every account
- Receive password inventory
- Receive key/contact lists
- Obtain written procedures where possible
- Review 90-day calendar
- Review current budget status

- Review open tasks and unresolved issues
- Schedule follow-up support contact (if available)
- Confirm formal sign-off on transition

This checklist will help ensure there are no surprises around finances, volunteers, technology access, literature inventory, or committee support after the manager departs.