

Transitioning and Knowledge Transfer

It takes many people in many various roles to make NEWH successful. One certainty is that those people will move into roles, shift out of roles, and into new roles on a regular basis. This new document and process requiring reviews between the outgoing and incoming persons is intended to help make these transitions smoother and to help with the transfer of knowledge that should accompany these transitions.

As you move **OUT** of a position:

1. Complete the **NEWH, Inc. Transition Document for Incoming/Outgoing Officers, Directors, & Chairs** document (attachment or link).
2. Review with your successor.
3. Forward a signed copy to the NEWH Office as confirmation and for record-keeping.

As you move **INTO** a position:

1. Expect your predecessor to approach you with the **NEWH, Inc. Transition Document for Incoming/Outgoing Officers, Directors, & Chairs** document (attachment or link).
2. If your predecessor is not forthcoming, approach them!
3. If your predecessor is not available, approach your President/Steering Chair for help in identifying someone with prior experience who can help.
4. Complete the Transition Document.
5. Review the Transition Document.
6. Forward a signed copy to the NEWH Office as confirmation and for record-keeping.

The target date to have the reviews completed and the signed documents to the NEWH, Inc. Director/Scholarship & Education – Staff (Erika Swansen, erika.swansen@newh.org) is **January 31st or within 30 days of assuming the role.**



**NEWH, Inc. Transition Document for Incoming/Outgoing
Officers, Directors, & Chairs
(NEWH, Inc. Board, Chapter Board, Regional Steering Committee)**

This document is to be completed by the outgoing position in conjunction with the incoming position. The document must be completed and submitted to the NEWH, Inc. Director/Scholarship & Education – Staff (Erika Swansen, erika.swansen@newh.org) within 30 days of assuming the role or by January 31st, whichever comes first.

Position: _____

Outgoing Person: _____

Incoming Person: _____

Meeting Frequencies (Inc. Level, Chapter Board/Steering Committee, Committee):

List/Review Processes and Procedures:

List/Review Significant Events: List any signature events, annual events, budget/cost review, current projects, upcoming deadlines, etc.

Review the Following Resources/Items:

- Review Job Description and Task List
- Conflict of Interest/Code of Ethics - <https://newh.org/code-of-ethics-conflict-of-interest-form/>
- Google Drive
- NEWH Board Resources
- Agendas
- Meeting Minutes
- IBoD Meetings
 - Reports
 - Travel Expenses/Reimbursement
- Equity, Inclusion, & Diversity Guidelines - https://newh.org/chapter_tools/

Username & Passwords:

- o Zoom: _____
- o Social Media: _____
- o Other: _____

Main Contact(s) at NEWH, Inc. Names/Emails:

<input type="checkbox"/> Sandy Banks – NEWH, Inc. President sandy.banks@newh.org	<input type="checkbox"/> Shelia Lohmiller - Chief Executive Officer shelia.lohmiller@newh.org
<input type="checkbox"/> Susan Huntington - Chief Financial Officer susan.huntington@newh.org	<input type="checkbox"/> Diane Federwitz - Director/Membership & Events diane.federwitz@newh.org
<input type="checkbox"/> Jena Seibel - Chief Operating Officer jena.seibel@newh.org	<input type="checkbox"/> Hillary Eggebrecht - Director/Communications hillary.eggebrecht@newh.org
<input type="checkbox"/> Julie Hartmann - Director/Finance julie.hartmann@newh.org	<input type="checkbox"/> Erika Swansen - Director/Scholarship & Education erika.swansen@newh.org
<input type="checkbox"/> Kate Nesbitt - Director/Conferences & Tradeshows kate.nesbitt@newh.org	<input type="checkbox"/> Kathy Coughlin - Administrative/Membership Coordinator kathy.coughlin@newh.org
<input type="checkbox"/> Denise Huntington - Finance Support denise.huntington@newh.org	<input type="checkbox"/> Trudy Craven – NEWH Business Advisor trudy.craven@twcconsultngllc.com

Other:

List/Review Lessons Learned: Review any lessons learned and/or operational changes you would recommend.

Outgoing Position Signature

Date

Incoming Position Signature

Date