

RJD Transition Checklist

This checklist is designed to give new RJDs an overview of activities you may need to conduct during your first few months in office. It is not meant to provide the detailed information you will need to conduct these activities. Please consult the *Operating Code* and *Election Guidelines* for specific details. Likewise, it is not an exhaustive list of activities. The focus is just on activities you may need to initiate prior to the training session for new board members at the National Governing Board meeting in the summer.

Information Sources

- Go to NAWGJ website and click on the SJD Information link in left sidebar.
- Obtain sign-on name and password from National Secretary or former RJD.
- Scroll down until you find the Operating Code and review the duties and responsibilities of the RJD in the Operating Code.

Records

- Obtain records from former RJD including: current budget, RJD and SJD financial reports for the past year, and meeting minutes.
- If you start receiving lists of CPE compliance from your SJDs, you don't need to act on these. Just file them for future reference if needed.

Financial

- Open a bank account in the name of NAWGJ Region XX (or have your name added to existing account and remove former RJD name)
 - Obtain a copy of "Determination Letter" from NAWGJ Finance Director or former RJD.
 - Obtain a debit card for the account, but not a credit card
 - Obtain appropriate signature forms and add two NAWGJ Executive Board officers (follow procedures of your bank). Typically, you will include the Director of Finance and one other officer (sometimes the Secretary is required by the bank or the President).
- Obtain and review annual budget from former RJD. This could be your budget for the remainder of the fiscal year (Nov. 1 – Oct. 31) or you may revise the budget with approval of your SJDs as needed. Some RJDs develop their annual budget for approval by their Board during the summer meeting and then revise it if needed during the year (via email, GoToMeeting, or face-to-face meeting).
- Set up a financial record keeping system such as Quicken, Excel, or other.
- Review copies of the state and region financial reports from the former RJD.
- If applicable, ask any outgoing SJDs to complete the quarterly financial report for May 20 so that the new SJD does not have to deal with unfamiliar records/expenses.
- Here's a few financial tips you need to know right away:
 - Keep receipts for all expenditures
 - Obtain W9 forms if you will be paying any service provider, e.g., clinician, consultants

Elections

- Check the Election Guidelines (see SJD webpage) to determine if State Governing Boards (SGB) elections need to occur in your region this year.
- If SGB elections will occur in the current year, discuss options with the SJDs for establishing board positions in each state. Options include:
 - Defined position titles and descriptions for all positions.
 - At large positions for all elected SGB members.

- Hybrid with some positions defined and others at large.
- In May, obtain list of members for each state from *Wild Apricot* website: <http://naow3gj.wildapricot.org/> (or you can ask each SJD to do this). You will be added to *Wild Apricot* as an administrator by the NAWGJ National Secretary. After you have access, click on “Admin View” in the upper right corner. In the Advanced Search tab, search for a list of members for each of your states. Send the list of current members to each SJD and ask them to verify/update their membership for purposes of the election (or you can ask each SJD to do this).
- Begin the election process using the *Voting Place*. See the Election Guidelines for instructions on how to establish an account. **If you will have elections in multiple states, be sure to follow the instructions for setting up multiple elections.**
- Conduct the elections following the procedures in the guidelines.

Meetings

- Obtain date and location of National Governing Board (NGB) meeting from former RJD or other National Executive Officer.
- Make travel plans (plane and hotel reservations) for national meeting.
- Prepare a verbal report on the status of your region for a brief presentation at NGB meeting.
- Send the NGB meeting schedule to SJDs when you receive it.
- Hold dates on your calendar to attend a NGB meeting at National Judges Cup (typically first or second weekend of January).
- Consult with USA Gymnastics Regional Chair to determine if you are required to attend or may attend USA Gymnastics regional board meeting. Add to your calendar if applicable.
- Schedule a meeting of SJDs at the National Governing Board meeting and request a meeting room at the hotel from the NAWGJ President. Friday evening typically works best. Obtain minutes from the last Regional meeting for official approval by SJDs. Prepare an agenda for the meeting.
- Review *Robert’s Rules of Order* for appropriate procedures for conducting meetings.

Assigning of Regional Meets

- Identify timeline for issuing contracts for regional meets (work with your USAG Regional Board).
- Issue contracts as needed.
- Identify method of collecting assigning fees for regional meets if applicable.

Website

- Review your region’s page on the NAWGJ website. Go to the *Directory-Regional State* link on the NAWGJ website. Click on your region. Review SJD contact information and send updates to NAWGJ website director. Also send new/revised SJD contact information to NAWGJ Secretary.
- Obtain a head shot in your NAWGJ uniform and send to NAWGJ website director.
- Review your region’s webpage to determine if you want to add or update items.

Other

- Consider recognition awards for outgoing RJD and outgoing SJDs in your region, e.g., plaque, engraved item, framed photo, etc. *Things Remembered* (in most malls) has the NAWGJ logo on file if you want to order from them.
- Find the SJD calendar on the NAWGJ website (located in the miscellaneous section of the SJD webpage). Enter relevant due dates on your calendar.