

SJD Transition Checklist

This checklist is designed to give you an overview of activities you may need to do during your first few months as a new SJD. It is not meant to provide you with the detailed information you will need to conduct these activities. 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 SJDs at the National Governing Board meeting. Please consult the *Operating Code* and *Election Guidelines* for specific details. You will receive additional training at the National Board meeting in the summer.

Information Resources

- Go to NAWGJ website and click on SJD Information link in left sidebar.
- Obtain sign-on name and password from National Secretary or former RJD.
- Scroll down until you find the State Judging Director's Handbook. Review the Operating Code for procedural information for the various functions you need to perform.

Records

- Obtain records from former SJD including: current budget, quarterly financial reports for the past year, and meeting minutes.

Financial

- Open a bank account in the name of NAWGJ (may add your state name after NAWGJ if you want)
 - Obtain a copy of "Determination Letter" from 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).
- Obtain and review annual budget from former SJD. This will be your budget until the end of the fiscal year on October 31.
- Set up a financial record keeping system such as Quicken.
- Obtain and review copies of the state financial reports from the former SJD.
- Need-To-Know Financial Tips:
 - Keep receipts for all expenditures
 - Obtain W9 form if you will be paying any service provider, e.g., clinician, consultants
 - Establish a four-eyes system for financial transactions

Elections

- Check Election Guidelines to determine if State Governing Boards (SGB) elections are scheduled for current year.
- If SGB elections will occur in the current year, discuss options for establishing board positions in each state with your RJD. 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.
- Obtain approval of SGB for positions to be included in board elections.
- Publish positions to be elected with all members in your state.
- Discuss items needed by RJD for her/him to conduct election, e.g., updated membership list, positions, etc.

Meetings

- Obtain date and location of National Governing Board (NGB) meeting from the RJD. New SJDs may need to arrive a day early for the New SJD workshop.
- Make travel plans (plane and hotel reservations) for national meeting.
- Schedule a meeting of SGB according to state's practice. Send out announcement 3 weeks in advance and agenda two weeks in advance. Obtain minutes from last SGB meeting for approval at your meeting.
- Obtain signed Confidentiality forms and Conflict of Interest forms from each board member at your first meeting. The forms are available on the NAWGJ SJD website (2 separate forms).
- Obtain information from NAWGJ President on training date scheduled to become a Test Administrator (it may be at National Congress).

Assigning

- Determine your responsibilities for assigning, if any.
- Obtain access to assigning system, if applicable.
- Initiate process based on state's timeline.
- Ensure CPE forms are completed and sent to appropriate person.

Transition of Services

- Provide for uninterrupted transition of services as applicable:
 - a. Availability
 - b. Assigning
 - c. Web services

Other

- Consider recognition awards for the outgoing SJD and SGB members, 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 (it is located in the miscellaneous section of the SJD webpage). Enter relevant due dates on your calendar.