

Officer Transition Checklist

Every role · Every step · Ready for your June handover meeting

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How to use this checklist: Print one copy per officer role. Work through it together in your final handover meeting, outgoing and incoming officer side by side. Check each box as it is confirmed, not just discussed. Bring it to your installation ceremony.

PHASE 1 · April to June Pre-Transition

- ☐ Hold elections prior to April 15
- ☐ Register new officers in the Lion Portal by May 15
- ☐ Notify District Governor, 1st and 2nd VDG, and Zone Chairperson
- ☐ Enroll all new officers in LLC (Lions Learning Centre) courses
 - ☐ Mandatory for all incoming officers; complete before July 1
- ☐ Schedule officer handover meeting (target: last week of June)
- ☐ Confirm installation ceremony date and venue
- ☐ Identify any officer roles that remain unfilled; escalate to DG
- ☐ Review current year's unfinished projects and pending action items
- ☐ Confirm Leo Club advisor continuity (if applicable)

PHASE 2 · Handover Meeting Records Handover, All Roles

Download the Transition Package first. In HoursServed, go to Export Center, then Officer Transition, and download the Transition Package for the fiscal year that just ended. Five reports:

1. Member Attendance Summary
2. Service Hours by Event (structured for Lion Portal entry)
3. Service Hours by Member (internal use only; never submitted)
4. Volunteer Participation Report
5. Event Performance Summary

Review the package together in the handover meeting. It is the incoming officer's picture of who served, what the club ran, and what the year's service record looks like.

Secretary to Secretary

- ☐ Download and hand over the Transition Package (above)
- ☐ Transfer membership roster (Lion Portal and HoursServed Members list)

- ☐ Hand over correspondence files, minutes archive, and meeting templates
- ☐ Confirm report distribution email list in HoursServed, under Club Settings, Report Automation
- ☐ Verify Lion Portal login credentials are updated
- ☐ Walk through the Volunteer Participation Report together so the incoming Secretary knows the club's active volunteers by name

Treasurer to Treasurer

- ☐ Transfer signing authority on club bank account
- ☐ Hand over financial records, dues tracking, and audit files
- ☐ Confirm fiscal year start date in HoursServed, under Club Settings

President to President

- ☐ Brief on outstanding district commitments and zone relationships
- ☐ Hand over club strategic plan, goals, and Year-in-Review notes
- ☐ Review the Event Performance Summary from the Transition Package when setting next year's goals
- ☐ Confirm HoursServed admin access transferred to incoming President

Leo Advisor (if applicable)

- ☐ Confirm Leo officer list updated in Lion Portal
- ☐ Brief incoming advisor on Leo calendar, projects, and district contacts

PHASE 3 • Installation Day Installation and First Platform Actions

- ☐ Complete installation ceremony; record date
- ☐ Year-in-Review presented to membership
- ☐ New club goals announced and documented
- ☐ **HoursServed platform handover**
 - ☐ Invite new Secretary as admin: HoursServed, Invite Admins
 - ☐ Remove or downgrade outgoing officer access as appropriate
 - ☐ Verify report automation emails are correct
 - ☐ Confirm month lock day setting
 - ☐ Confirm fiscal year start is still correct
 - ☐ Verify Lion Portal sync settings
 - ☐ File the Transition Package with the club's permanent records
- ☐ Use the in-app Officer Transition Checklist for step-by-step platform actions

PHASE 4 • July to September First 90 Days

- ☐ **July 1: New term begins**
 - ☐ All officers have platform access confirmed

- ☐ First event of new term created in HoursServed
 - ☐ Member dues cycle reset if applicable
 - ☐ **By August 1, 30-Day Checklist**
 - ☐ Attend district training session (GLT / GOT)
 - ☐ ELLI completed for first-time officers
 - ☐ First monthly service report generated and reviewed
 - ☐ Zone Chairperson introduction meeting completed
 - ☐ **By September 30**
 - ☐ RLLI completed for officers pursuing zone or district leadership
 - ☐ Annual membership goal set and entered in Lion Portal
 - ☐ Leo annual plan submitted to district (if applicable)
 - ☐ Lion Portal service reporting opens July 1; log service hours promptly
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This checklist complements the LLC courses required of incoming officers; it does not replace them. The LLC covers roles and responsibilities. This checklist covers the records, platform actions, and handover steps that make those responsibilities achievable from day one.