Officer Changeover Checklist

This is intended to assist you in updating your website appropriately at the end of officers' terms when you are switching to new officers. Some things to review in your FreeToastHost website when switching to new officers:

1   If you are using a custom domain, it is a good time to review your expiration date for your custom domain. You can check this for your custom domain using http://www.whois.com/ . If your custom domain will be expiring in the next officer term, it is a good idea to give your incoming treasurer a heads up in advance about any renewal cost that they should expect during their term.

2   Try to get member photos and completed bios for all of your incoming club officers. Get their permission to make their profiles public so that they show up on the Meet Our Members page.

3   Review your home page and custom web pages to identify anywhere that your current officers are identified, as you will likely want to update those pages to reflect the new officers. A simple approach to doing this is just to make a copy of the current pages as custom web pages and set them as unlisted so that you can work on the updates without having to show them right away.

4   Review your Access Settings as the incoming officers may want to do things differently with regards to admin console access for your website.

5   You will need to update the officer settings in Membership Management. If you want to save your current officers to a "formerofficers" group or your new officers to a "newofficers" group, you can do that by making a custom group.

6   Make sure that the new officers understand the implications of the club email reply settings. For example, if your officer email reply settings are set to Reply All, make sure the new officers understand that if they reply to those emails, the replies go to all officers and the sender.

7   Make sure that the new officers understand that, by default, they are assigned publically accessible officer email addresses ("aliases") that forward to their real email addresses. If the new officers ever get spammed at these email addresses, the email

addresses can be disabled or the sender of the spam can be blacklisted. Lastly, make sure that officers understand that they can publish their officer email address instead of their personal email address.

8   Determine who will be the club contacts for the new officer term. If your club has chosen to just make the contacts associated with specific officer roles (easier) you may not need to do anything with this, but if your contacts are specific members, you will likely need to update them in Email and Contact Forms (Contact Us Form tab).

9   Determine who will be your mentoring contact for the new officer term (your VPE?), and set that on the Mentoring Form tab in Email and Contact Forms.

10 If you are using the FreeToastHost agendas, you will probably want to verify who will want to get Role Change Notifications during the next officer term. For example, your club president may not want to receive those notifications. The Role Change Notifications are set up in the Meeting Agenda Settings module.

11 Be prepared to go over the functionality of different admin console functions for any incoming officers that will be using the admin console.

Historically, officer changeover has been associated with some confusion about how to modify website settings to reflect the new officers. Hopefully, the above checklist will help make this changeover go a bit smoother. Please let us know if we have forgotten anything in the above list.