

Principal Transition Procedure
Cherry Hill Huaxia Chinese School

PRINCIPAL TRANSITION CHECKLIST

A Checklist for Outgoing Principal

Intention:

This checklist is intended to provide new Principal a complete orientation of his/her duties and responsibilities that is provided by Cherry Hill Huaxia Chinese School (hereafter as CHHX) outgoing Principal.

Implementation:

This checklist will be presented to both the outgoing Principal and the incoming Principal. Initials from outgoing Principal and incoming Principal are required for each completed items on the list. At least one member from CHHX Board of Directors should be present at times when the checklist items are completed and being initialed.

Principal transition procedure should start at least 3 weeks prior to last day of academic year per CHHX school calendar. All items on the checklist should be completed by the end of term for outgoing Principal.

A. Information about CHHX:

- Review CHHX's history
- Review CHHX Policies, and Procedures
- Review CHHX constitution, mission statement
- Review your goals and objectives for the last year

B. Printed materials as of 6/30/2010 to pass on to new Principal:

- All CHHX records, binders, files, notebooks and correspondence
- CHHX Board meeting agendas and minutes
- status reports for continuing projects
- Textbook inventory report
- Special events/activities reports
- Asset list including hardware, software

All CHHX financial records listed below:

- Financial statements including:
 - bank statements
 - balance sheets, asset allocation
 - cash flow statements
- Tax filing records
- Petty cash reconciliation
- Treasure's accounts
- All closed accounts
- All deposits of net earnings to CHHX reserve fund

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- Fundraising information
- Revenue reports
- Expense reports
- Budget reports
- Accounting records including:
 - payment receipts
 - record of paid expenses without receipts

- Previous and current mailing list & email list of :
 - students & parents,
 - teachers
 - contracts
 - business contacts, including Cherry Hill School District

- Student records:
 - student registration records
 - student academic transcripts and current report cards
 - student attendance records

- Teacher and staff records:
 - All personnel information
 - Teacher & staff payroll and benefit information including W2s, 1099s

- CHHX website
 - website maintenance procedures
 - on-line registration procedures, manuals

- C. Items to pass on to new Principal:**
 - Keys to building, alarm system, files and records, storage, etc
 - Computer and other electronics
 - Electronic files
 - CHHX seals, and banking materials including check books, deposit slips, credit card, ATM debit card, etc
 - Transfer signer authorization to new Principal

End of Principal Transition Checklist