

HOW TO: HANDOVER



Every year, it is common for turnover to occur within a society's executive or committee due to members graduating or even recognising different priorities. To ensure the continuation of the society as well as its continued quality, the presentation of a good handover process is essential to the new students who will be succeeding as the future leading charge.

1. Why have a handover?

With the gift of hindsight, many of us would want to approach matters differently by knowing the outcome of the future. Thus, a handover is a process where future leaders of the club learn important relevant skills and strategic plans for the future. In addition, a handover allows the society to further develop from its current mould rather than starting from scratch. Even if an important member of the current executive chooses to relinquish their position in the middle of the year, important documents are held and can be transferred to the immediate successor. However, the new ingoing executive may choose to forego your advice and strive to develop the society in their own unique direction. That is alright, but let them know you'll be there should any problems arise.

2. When should the handover be organised?

Most club handovers take place at the end of the year (after an AGM) after the examination period. However, please make sure that the date of the handover is compatible and happens before the date anyone leaves.

3. Things to handover

- All club documents (hardcopy/digital)
 - Financial records (including access to the bank account-see below)
 - A copy of the club constitution
 - Previous meeting minutes
 - Important contact details
 - The member list (even though you'll create a new one) and contact details of important people.
 - Society calendar of events & a review of 'what went well' and 'even better if'
- A contact list of businesses, faculty and people of interest the club has correspondence with
- All club property
- Information about the society's files, Facebook page, mailboxes etc. (This includes passwords and usernames)

- Information about past events and sponsorship details, including any ongoing obligations or any existing problems
- Ideas for the future & Important skills (How to set up a budget, take minutes etc)
- Advice running the club

Tip: Ensure that the documents are either in “.pdf” or “.word” format to ensure they can be accessed by most operating systems

4. Steps when having a handover

1. Prepare documents and organise date & venue of handover.
2. Have an informal meeting between different successors (eg treasurer-treasurer) sometime before the official handover to have an in-depth recognition of what the role has.
 - a. Think about the person who will succeed you and consider adding/removing any additional pieces of advice based on their traits and skills
 - b. Write down the more important facts as your successor may not remember everything.
 - c. Do talk about your personal interpretation of the role along with what is expected.
3. Have everyone assembled at the venue at the agreed time and have a run through of what needs to be done.
 - a. Grant admin access to the Facebook page, Google Drive, and any relevant tools used.
 - b. A general discussion on society traditions, what went well during the year and what could be done better.
4. (Optional): Since all of the necessary members are gathered at one spot, go to the bank and change the trustees (detailed below)

Tip: It is recommended that each executive role compiles their own annual handover document enlisting the duties the role entails as well as advice. This document can be passed on from generation to generation to ensure whole pieces of information are not lost

5. How to transfer the bank account to a new set of trustees?

This assumes the current society is currently registered with the Commonwealth Bank located within the ANU.

1. Have a meeting where it is documented the current President grants access to the new Treasurer and President, and access is removed for any outgoing personnel. Print out the minutes of the meeting .
2. All members (current & succeeding) must gather at the bank, where they are to listen to what the bank employees instruct.