Handover Template (Society)

This Handover Template is designed for current committee to give all of the incoming committee all of the essential details and information for successfully taking over the society for the next academic year. This form contains two sections:

Section One: To be completed together as a group  
Sections Two & Three: Role specific, one each to be completed per role

Please replace the red text with your own information/answers as you work through the document. Please note that these questions are guidelines and that you may wish to include additional information as you see fit.

**Section One: Practical Information**  
***Section one should provide your successor with the essential tools and information that you need in order to fulfil their new role successfully.***

**Large Events**

Do you organise any big events throughout the year? What are they? Where did you book the venue? Who did you contact? What did you charge for ticket prices?

**Fairs**

What did you use at Freshers and Refreshers Fair to publish your society? Pass on any banners, posters, flyers, films played on laptops, spreadsheets used to collate membership data – the new committee will find all of this really useful! Did you offer any discounts when you attended the fairs? What is the primary information you want to convey during the fairs (trial dates, membership fees, taster session information etc)? Which committee member(s) are responsible for this?

**Classes/Lessons/Training**

Do you have an external coach or teacher? If so, what documentation do you need to provide the Students Union? How should the new committee contact them? How much did they charge? How did you pay them? Do you have a rota for who went to your workshops/classes/training/socials? Who organised these? Which committee member(s) are responsible for this?

**Equipment/ Merchandise**

Do you use any special equipment? Are you responsible for maintaining/storing any equipment items? If so, where do you store it? Who has access to it? How do you gain access if needed? What documentation do you need to provide the Students Union of your assets and how often? *Try to introduce the new committee members to the venue manager to continue a good working relationship.* Which committee member(s) are responsible for this? Are you responsible for ordering any merchandise/clothing/items? *(Make sure you do pass on any equipment/merchandise to your successor! Eg Banners, key)*

**Money, Sponsorship and Fundraising**

How do you manage your accounts? Who do you speak to about accessing your accounts, accessing the balance, or making a payment? Have you been using a spreadsheet to record membership fees or payments to sessions or outstanding fees of any kind? – Pass this on! Do you have sponsorship? What are the contact details? Do you have any fundraising activities you usually do? How do you go about organising them? Who is your contact for fundraising?

**President Key Tasks**

What are the main responsibilities and day to day tasks of this role? What should your successor start on as their first task/project?

**Treasurer Key Tasks**

What are the main responsibilities and day to day tasks of this role? What should your successor start on as their first task/project?

**Communications/Secretary Tasks**

What are the main responsibilities and day to day tasks of this role? What should your successor start on as their first task/project?

**Equipment/Events Tasks**

What are the main responsibilities and day to day tasks of this role? What should your successor start on as their first task/project?

**Health & Safety Tasks**

What are the main responsibilities and day to day tasks of this role? What should your successor start on as their first task/project?

**Other positions and Tasks**

What other positions do you have on your committee? What are the main responsibilities and day to day tasks of those roles? What should your successor start on as their first task/project?

**Key Contacts**

Who are your key contacts, what are their details and how do you work with them?

**Key Dates**

Does your society have any key dates or particular deadline to be aware of? *Make sure you include all big events such as races, overseas trips, star grading deadlines, and grading dates to be aware of etc*

**Websites/Social Media**

Can you provide any login or admin details for email accounts/social media/websites?

Handover Template (Role)

**Section Two: Experience in your role  
*Section one is an opportunity for you to reflect upon your time in the post, to prepare and inspire your successor to feel excited about the year ahead. These are to be completed separately for each role, and are specific to your direct successor.***

1. What is the best part of your role?  
   Answer
2. What has been your greatest achievement?   
   Answer
3. What is the most challenging part of your role?  
   Answer
4. Are you responsible for any events? How did you organise them?  
   Answer
5. What qualities do you think are required to succeed in your particular position?  
   Answer

**Section Three: Ideas and Advice  
Section three is an opportunity to offer your successor additional advice to help them in the role. What can you tell them with the benefit of hindsight?**

1. Is there any way that you think your role could be developed or improved?

Answer

1. What would you do differently to make your events/projects more successful?  
   Answer
2. If you could replay the year, is there anything you’d do differently within your role?  
   Answer
3. Is there anything you wish you’d known at the beginning of your year in post?  
   Answer