Handover checklist

A handover checklist helps ensure that induction process doesn't miss anything important. Here's an example:

☐ Keys / alarms

☐ Email and contact list

☐ Constitution, bylaws and any policies and procedures (e.g. Codes of Conduct)

☐ Strategic plan

☐ Financial reports

☐ Previous meeting agenda, minutes and schedule

☐ Bank accounts (including transferring signatories)

☐ Meeting schedule

☐ Property and inventory

☐ Lease and any other tenure instruments

☐ License details (e.g. liquor, gaming, food handling)

☐ Legal contracts or agreements

☐ Safety and statutory inspection details (e.g. fire, electrical, asbestos, gas, plumbing)

☐ Maintenance obligations and maintenance schedule

☐ Member list

☐ Calendar of events

☐ Important dates (e.g. affiliation, purchasing)

☐ What worked well and what should change

☐ Important contact details (e.g. sponsors, suppliers, Council)

☐ Login credentials or admin access and payment/renewal details for:

Website

Email

Social media accounts

Cloud file storage

Other subscriptions and software (e.g. payment gateways, financial software, membership management system, competition management software, survey software, design software, grant portals)

☐ Update all passwords and remove access for non-current MC members

☐ Details of external relationships (e.g. local elected representatives, peak bodies, Council and government officers, sponsors, suppliers, venues)

☐ Details of regular activities required under each role

☐ Details of ongoing support available to incoming MC members