



## Handover Checklist for the Outgoing Executive

As the end of the year is fast approaching outgoing committees should ensure that all their hard work is not lost. You can do this by making sure the handover process is performed correctly. Use this checklist to ensure all relevant information had been provided to the new executive committee. It is also recommended that the prospective committee members shadow the outgoing committee, attending committee meetings and working with them on all tasks remaining for their term.

Employee Information	✓	Executive Information	✓
List of employees and positions		Committee job descriptions for all positions	
Employee personnel files – Letter of appointment/Position descriptions		Year aims and objectives	
Current awards and agreements for employees		Communication information (e.g. access to the committee email, Facebook)	
Current pay rates		Procedures for running core activities and submitting event proposals	
Update list of employee current pay levels		Current Association Constitution Rules / By Laws / Standing Orders	
List of employees increments and anniversary dates		Other Association Policies	
Current records of employees leave entitlements (Annual Leave / Sick Leave / Long Service Leave)		Address list of contact for assistance – Government Departments, Bank, and Insurance. (Include contact name if you have one)	
Current employees records (All records from the time of their employment starts)		List of accounts (e.g. Australian Tax Office) that has restrictions and can only be accessed by one or two committee members needs to be changed	
Past employee records (Those who have resigned/terminated must be held for up to 7 years)		Minute books with minutes from all meetings since Association commenced	
List of superannuation funds		Motions Register	
WorkCover information		A list of important issues/projects, which need to be followed up or continued by the new Executive	
Address list of contact for assistance – Industrial Relations or Employer Union (CMSolutions), Australian Tax Office, Super Fund, WorkCover. (Include contact name if you have one)		Any diary that has been kept by the Executive on issues, events and/or invitations attended by outgoing Executive	
		Books of accounts for current and previous years	
		Cheque, Receipt and Order Books	
		Asset Register	
		Auditor Statements and reports for the past 7 years including current year	
		Bank form for Change of Signatories and any investment funds	
		Register of Members	
		Meeting Procedures	
		List of everything that has password protection and include current password	

**Disclaimer: This information has been provided by Community Management Solutions as general guidance and should not be treated as advice. Please contact CMS for further advice.**