

## Handover Checklist for the Outgoing Executive

### 1. Employee Information

- List of Employees and Positions ☐
- Employee Personnel Files – Letter of Appointment/Position Descriptions ☐
- Current Awards and Agreements for employees ☐
- Current Pay Rates ☐
- Update list of employees current pay levels ☐
- List of Employees Increments and Anniversary Dates ☐
- Current records of Employees Leave entitlements:
  - Annual Leave ☐
  - Sick Leave ☐
  - Long Service Leave ☐
- Current Employees – all records from the time of their employment starts ☐
- Past Employees – those who have resigned/terminated must be held for up to 7 years ☐
- List of Superannuation Funds ☐
- WorkCover information ☐
- Address list of contact for assistance — Industrial Relations or Employer Union, ATO, Super Fund, WorkCover, etc. (Include contact name if you have one) ☐

### 2. Executive Information

- Current Association Constitution/By Laws/Standing Orders ☐
- Other Association Policies ☐
- Meeting Procedures ☐
- Register of Members ☐
- Minute Books with Minutes from all meetings since Association commenced ☐
- Motions Register ☐
- A list of important issues/projects, which need to be followed up or continued by the new executive. ☐
- 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 ☐
- Assets ☐
- Auditors Statements and reports for the past 7 years including current year ☐
- Bank form for Change of Signatories and any investment funds. ☐

- Address List of Contacts for assistance – Government Departments, Bank, Insurance, (Include contact name if you have one). ☐
- List of accounts (eg. ATO, FACs, DOC) that has restrictions and can only be access by one or two committee members needs to be changed. (Forms for changes of contacts can be obtained from the appropriate organisation) ☐
- List of everything that has password protection and include current password ☐

**IF YOU ARE NOT SURE WHAT RECORDS ARE TO BE KEPT SEEK ADVICE BEFORE YOU ACT**

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