



HM Treasury

# Handover note

Job title  
Branch name  
Team name  
Group name

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Date

Your name

**Dear [X]**

Welcome to the Treasury and the [X] team!

I have tried to set out as much useful information as possible in this note, including:

- Policy areas and possible issues to take forward
- Links to key documents. They are all in SharePoint.
- Key contacts and stakeholders

My biggest tip for this job is to [X]

I hope you find this handover note useful. Please feel free to give me a call on [X] or drop me an email [EMAIL ADDRESS] if you have any questions....

**[YOUR NAME]**

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# SECTION 1: INTRODUCTION TO HM TREASURY, GROUP AND [X] TEAM

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## HM TREASURY

You may need to book yourself on a Treasury induction course – a course run by [Learning and Development](#). The next one is on [DATE].

You may find the [Treasury organogram](#) useful. It sets out all the groups, teams, Deputy Directors, etc.

The [About us section](#) on the intranet details our ministers, management, priorities, etc.

The Groups dropdown provides more information on each group, with links to their sites and other key documents and links.

## GROUP (GROUP ACRONYM)

There is information about [GROUP] on the intranet.

There is a group organogram [INSERT LINK] plus sections on [DETAIL AND LINK TO OTHER CONTENT OF INTEREST].

The Treasury's corporate repository is Info Store. Please take a look at [Getting started with Info Store](#) that you know how to use it.

There are inductions for [LINK TO DETAILS] - the next one is on the [DATE].

The [GROUP NAME] senior management team (team leaders, deputy directors and director generals) meet every [DAY] at [TIME].

## TEAM (TEAM ACCRONYM)

The Deputy Director is [NAME] and is in the office on [X]. Their details are here [LINK TO MY SITES ENTRY].

Business support is provided by a team called Group Management Support or GMS. [LINK TO GMS DETAILS].

Our SharePoint site [INSERT LINK TO TEAM SHAREPOINT SITE] will give you more details and includes a team organogram: [LINK TO TEAM ORGANAGRAM]

Responsibilities within the team are as follows:

### [BRANCH NAME 1]

[BRANCH LEAD NAMES]

[ROLE OF BRANCH]

### [BRANCH NAME 2]

[BRANCH LEAD NAMES]

[ROLE OF BRANCH]

### [BRANCH NAME 3]

[BRANCH LEAD NAMES]

[ROLE OF BRANCH]

**Filing**

Our files can be found in Info Store. [DETAILS OF DOCUMENT LIBRARIES – NAMES, LOCATIONS, WHAT SHOULD BE FILED WHERE, ETC.]

**Team meetings**

These are every [DAY]. Team meetings usually cover [X]

**Line Management**

You have formal line management responsibilities for [X].

**Appraisals**

Appraisal rounds run from April to April with mid-year reviews undertaken around November. Guidance is issued annually on the process. [Performance management and appraisals](#).

**Cost centre**

The team's cost centre is [XXXXX]

## SECTION 2: JOB DESCRIPTION

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As head of/member of [INSERT BRANCH NAME], your work will be varied and issues and priorities will and do change over time.

In broad terms the team is responsible for:

- [LIST OF RESPONSIBILITIES]

Our objectives are [LINK TO SHAREPOINT PAGE ON TEAM OBJECTIVES] .

Working with the other branches, you are responsible for ensuring the potential for [NAME OF POLICY AREA] to support the Government's wider economic, social and environmental objectives is fully explored in joined up policy-making across the Treasury.

Key responsibilities for the branch include:

- [LIST OF RESPONSIBILITIES]

A wide range of issues will cross your desk in any one week – these can range from: [INSERT TYPICAL TYPES OF ISSUE]

Key questions I would always ask are:

- [LIST OF KEY QUESTIONS]

### **HMRC**

- [LIST OF HMRC CONTACTS]

A lot of HMRC contacts are on Treasury's address list (prefixed with "zzHMRC\_"). Otherwise the standard email format for those who have external email is firstname.lastname@hmrc.gsi.gov.uk

### **Other Government departments**

- [LIST OF CONTACTS]

### **Meetings with Ministers**

You will sit in on meetings with Ministers on the majority of [POLICY AREA] policy issues that fall within the branch – these are most often around [KEY EVENTS, i.e. BUDGET] time.

A little planning ahead of a meeting goes a long way:

- [LIST OF MEETING TIPS]

### **Routine tasks and meetings:**

- [LIST]

### **Lessons I learned while doing this job:**

- [LIST]

## SECTION 3: STAKEHOLDERS

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**Note to leaver: Please ensure you inform key stakeholders that you are leaving your post, and if possible, arrange to meet them with your successor before you move on.**

- [LIST AND DESCRIPTION OF KEY EXTERNAL STAKEHOLDERS]
- [BACKGROUND INFORMATION]
  - [BRIEFS ON KEY STAKEHOLDERS]
  - [LINKS TO DETAILS OF KEY MEETINGS FILED IN INFO STORE]
  - [LINKS TO MOST RECENT MEETINGS FILED IN INFO STORE]
  - [ANY OTHER RELEVANT INFORMATION]
- Arrange early meetings with the following stakeholders: [LIST]

## SECTION 4: POLICY AREAS

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### Policy issues

- [RELEVANT HISTORICAL POLICY ISSUE]
  - [BRIEF DESCRIPTION]
  - [CONTACTS INCLUDING HMRC, STAKEHOLDERS AND PRIVATE OFFICES]
  - [DEADLINES]
  - [LINK TO RELEVANT DOCUMENTS]
  - [EXTERNAL DATA SOURCES, INCLUDING KAI CONTACTS]
  - [ALERTS AND BRIEFINGS TO KEEP UP TO DATE]
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- [LIVE POLICY ISSUE]
  - [BRIEF DESCRIPTION]
  - [CONTACTS INCLUDING HMRC, STAKEHOLDERS AND PRIVATE OFFICE]
  - [DEADLINES]
  - [LINK TO RELEVANT DOCUMENTS]
  - [EXTERNAL DATA SOURCES, INCLUDING KAI CONTACTS]
  - [ALERTS AND BRIEFINGS TO KEEP UP TO DATE]

### Parliamentary questions

- [LIST OF OUTSTANDING PQS]

### Updating Paymaster General

- [ITEMS TO FLAG TO PMG]
- [LINK TO INFO STORE DOCUMENTS]

### Key Budget issues

- [CONTACTS]
- [WORKSTREAMS]
- [INFO STORE LINKS]

The Budget and Finance Bill database is used to track Budget measures. Induction courses are available from the [Learning Management System](#).

### Key measures for this Budget cycle to watch are:

- [LIST OF MEASURES]

### Other issues

- [MISCELLANEOUS ISSUES]

### Keeping current

Key cases that you will want to track are:

- [LIST OF CASES]

You can keep up to date with this via [WEBSITE LINK/EMAIL ALERT]

## SECTION 5: KNOWLEDGE MANAGEMENT

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### Key information sources are:

- [NAMES OF JOURNALS]
- [EMAIL UPDATES]
- [DATA SOURCES]
- [WEBSITES]
- [PEOPLE TO SEE OR CONTACT REGULARLY – internal and external]
- [KEY DOCUMENTS TO READ]

### Other useful sources of information include:

- [Parliament](#) (to check PQs in Hansard, and Committee proceedings)
- [Wired gov](#) (a free newswire service that will enable you to keep up to date with major publications and press releases across relevant government departments)
- [Useful links](#) to key Treasury partners, Public sector organisations, etc.
- [LIST FURTHER SOURCES]

### Routine tasks and meetings:

- [LIST]

### Lessons I learned while doing this job:

- [LIST]

I hope you enjoy working with the team – good luck!

[YOUR NAME]