VIEW Club Committee Handover Guide

Please use this guide when handing over to the incoming VIEW Club Committee. If there is no incoming Committee member for your position, please send the information and documents to your Club President.

We appreciate that you are all busy volunteers, but we ask that you please take the time to provide a detailed handover. It is important that the incoming Committee are provided with the required documents and information to carry out their new role to the best of their ability.

This document is to be used in conjunction with the Club handbook and position descriptions (available on the VIEW Website Resources Page).

Club Details

Please complete the details below and ensure all committee members have access to the required information. You might choose to keep an electronic copy of this document on a USB stick to allow these details to be easily updated each year as required.

Club Name		
Postal Address		
Club Meeting Details		
Day and Time		
Venue		
Venue Contact	Name	
	Number	
	Email	
Committee Meeting Day and Time		

Account and Log-in Details

It is good practice to **change the passwords to all club accounts after handover**. Make sure to update any security or recovery information such as personal email addresses or mobile numbers attached to these accounts to avoid losing access in the future.

Account	Email/Username	Password	Recovery Email/Number
Email Address			
Facebook			
My Smith Family Portal			
Square Reader			

Club President and Vice-President

Date and Signature

	Outgoing	Incoming
President		
Vice-President		

1. Support the incoming President/Vice-President

- ✓ Arrange a time to meet face-to-face for a formal handover
- ✓ Discuss the role of president as detailed in the Club Handbook
- ✓ Make sure the incoming President/Vice President is aware of:
    - Zone and Area Councillors
    - Club Handbook
    - The VIEW Website resources page (available here)

2. Documents, items and Information

It is recommended that, where possible, Clubs obtain a USB stick to keep an electronic copy of documents, templates, and records that can be passed on during handover.

☐ President's Committee badge

☐ List of club assets (template list at the back of this document)

☐ Committee List

3. Steps for Incoming President

☐ Ensure all physical club assets on the asset register (back page of this guide) are handed over

☐ Change the password and recovery email on the club email address and make sure relevant committee members have access

☐ Check in with new committee members to make sure they have received a thorough handover and they are confident in their role

☐ Update committee list with newly elected committee and provide to VIEW National Office (view@thesmithfamily.com.au)

☐ Make note of Zone and Area Councillor contact details

Secretary and Assistant Secretary

Date and Signature

	Outgoing	Incoming
Secretary		
Assistant Secretary		

1. Support the incoming Secretary/Assistant Secretary

- ✓ Arrange a time to meet face-to-face for a formal handover
- ✓ Discuss the role of secretary as detailed in the Club Handbook
- ✓ Make sure the incoming Secretary/Assistant Secretary is aware of:
  - Zone and Area Councillors
  - Club Handbook
  - The VIEW Website resources page (available here)

2. Documents, items and Information

It is recommended that, where possible, Clubs obtain a USB stick to keep an electronic copy of documents, templates and records that can be passed on during handover.

☐ Secretary's Committee badge

☐ Petty cash float

☐ Membership List

☐ Key to PO Box (if applicable)

☐ Minutes of meetings (AGM, Committee meetings, monthly meetings)

☐ Club history (Inaugural minutes and Charter)

☐ Records related to local and Zone/Area events

☐ Records related to membership surveys used to gather feedback from Club members about Club operations and performance

☐ Any templates or pro-forma documents (e.g. Agenda, minutes)

3. Steps for Incoming Secretary

☐ Update postal address with National Office if required.

4. Comments

Treasurer and Assistant Treasurer

Date and Signature

	Outgoing	Incoming
Treasurer		
Assistant Treasurer		

1. Support the incoming Treasurer/Assistant Treasurer

- ✓ Arrange a time to meet face-to-face for a formal handover
- ✓ Arrange for transfer of bank account access. You will need:
  - At least three signatories (one being the treasurer)
  - A letter from National Office (online request form available here)
  - A copy of the AGM Minutes as evidence of your appointment
- ✓ Discuss the role of treasurer as detailed in the Club Handbook
- ✓ Run through any expected regular payments or outstanding invoices
- ✓ Discuss audit requirements and previous audit outcomes
- ✓ Make sure the incoming Treasurer/Assistant Treasurer is aware of:
  - Club Handbook
  - Treasurers guide
  - The VIEW Website resources page (available here)

2. Documents, items and Information

It is recommended that, where possible, Clubs obtain a USB stick to keep an electronic copy of documents, templates and records that can be passed on during handover.

- ☐ Treasurer's Committee badge
- ☐ Cash book (preferably electronic)
- ☐ Financial records (receipts, cheque butts, bank statements, petty cash records etc.)
- ☐ Square reader and mobile phone (if applicable)
- ☐ Receipt books
- ☐ Cheque book
- ☐ Any templates or pro-forma documents (e.g. treasurers report)

3. Steps for Incoming Treasurer

- ☐ Update signatories on club bank account
- ☐ Ensure bank accounts are set up for online payments and approvals

4. Comments

Delegate

Date and Signature

Outgoing Delegate	Incoming Delegate

1. Support the incoming Delegate

- ✓ Arrange a time to meet face-to-face for a formal handover
- ✓ Discuss the role of Delegate as detailed in the Club Handbook
- ✓ Make sure the incoming Delegate is aware of:
  - Zone and Area Councillors
  - The National Schedule of Dates
  - Club Handbook
  - The VIEW Website resources page (available here)

2. Documents, items and Information

It is recommended that, where possible, Clubs obtain a USB stick to keep an electronic copy of documents, templates and records that can be passed on during handover.

- ☐ Delegate's Committee badge
- ☐ Details on upcoming delegates meetings
- ☐ Information about upcoming National, Area, or Zone events
- ☐ Copies of any relevant policies and procedures
- ☐ Any templates or pro-forma documents (e.g. delegates report)

3. Steps for Incoming Delegate

- ☐ Introduce yourself to the Zone Councillor

4. Comments

Program Officer

Date and Signature

Outgoing Program Officer	Incoming Program Officer

1. Support the incoming Program Officer

- ✓ Arrange a time to meet face-to-face for a formal handover
- ✓ Discuss the role of Program Officer as detailed in the Club Handbook
- ✓ Discuss event insurance form
- ✓ Make sure the incoming Program Officer is aware of:
  - Club Handbook
  - The VIEW Website resources page (available here)

2. Documents, items and Information

It is recommended that, where possible, Clubs obtain a USB stick to keep an electronic copy of documents, templates and records that can be passed on during handover.

☐ Program Officer's Committee badge

☐ Records of registrations and payments for club events and activities

☐ List of regular club events including details of any contacts with venues or local businesses

☐ List of club interest groups

☐ List of any potential guest speakers that the club has approached or has a relationship with

☐ Any templates or pro-forma documents (e.g. emails or invitations)

3. Steps for Incoming Program Officer

☐ Discuss club calendar for the next 12 months at committee meeting

4. Comments

Publicity Officer

Date and Signature

Outgoing Publicity Officer	Incoming Publicity Officer

1. Support the incoming Publicity Officer

- ✓ Arrange a time to meet face-to-face for a formal handover
- ✓ Discuss the role of Publicity Officer as detailed in the Club Handbook
- ✓ Make sure the incoming Publicity Officer is aware of:
  - The club website page and the website working group (viewwebsite@thesmithfamily.com.au)
  - VIEW National Facebook page (available here)
  - Club Handbook
  - VIEW Key Messages
  - The VIEW Website resources page (available here)

2. Documents, items and Information

It is recommended that, where possible, Clubs obtain a USB stick to keep an electronic copy of documents, templates and records that can be passed on during handover.

☐ Publicity Officer's Committee badge

☐ Any physical promotional materials (i.e. posters, brochures, essence cards)

☐ Records of photo media consent and any members who do not consent to having their pictures published

☐ Details of any existing relationships with community media or radio

☐ Templates and mailing list for club newsletter

☐ Any templates or pro-forma documents (e.g. emails or invitations)

3. Steps for Incoming Publicity Officer

☐ Change the password and associated account on the club Facebook page and make sure relevant committee members have access

☐ Confirm contact details and club meeting details on your club webpage are correct

☐ Send photo of new committee with first names and positions (L-R) to viewwebsite@thesmithfamily.com.au to update your club web page

4. Comments

Assets Register

Please use the assets register to keep track of all the physical items owned by your Club. This will assist at handover by creating one central list with all physical items that need to be transferred and who currently has them.

Physical items owned by a club might include: banners, square readers, aprons and bum bags purchased for stalls, and any items purchased from grant funds such as mobile phones, computers, video projectors or audio equipment.

Item	Current holder	Date of receipt	Signature	Date of return	Signature