

Role handover

Give the next person what they need to start. Complete this together, link to shared files, and agree who owns unfinished work.

Club and role [group and role name]

Outgoing and incoming [names]

Handover date [date]

Adviser or support contact [name and approved contact details]

What this role does

[Describe the main responsibility in two or three sentences. Include what the role can decide and what needs approval.]

Regular tasks

Task	When	How or where
[Task]	[Weekly, monthly, or termly]	[Steps or file link]
[Task]	[Timing]	[Steps or file link]
[Task]	[Timing]	[Steps or file link]

Open work to pick up

Work and next step	Owner	Due date
[Project or promise and what happens next]	[Name]	[Date]
[Project or promise and what happens next]	[Name]	[Date]
[Project or promise and what happens next]	[Name]	[Date]

Dates that matter

[Add upcoming meetings, application deadlines, renewals, elections, bookings, and school dates.]

Files and access

Resource	Where it lives	Access checked
Meeting notes and plans	[Shared folder or link]	[Yes or action needed]
Budget and approved expenses	[Shared folder or link]	[Yes or action needed]
Designs and communication channels	[Shared folder or link]	[Yes or action needed]
Rules, contacts and past event notes	[Shared folder or link]	[Yes or action needed]

Use the school or service's account handover process. Do not put passwords, recovery codes, or private student details in this document.

People who can help

Person or role	What they help with	Approved contact
[Name or role]	[Topic]	[School email or shared directory]
[Name or role]	[Topic]	[Contact]

What I wish I had known

[Write practical advice: what worked, what took longer than expected, and mistakes to avoid.]

Handover check

- [] Walk through the next two weeks of work together.
- [] Check that the incoming person can open the important files.
- [] Introduce them to the adviser and key contacts.
- [] Confirm how old access will be removed through the approved process.
- [] Agree a date for one short follow up.

Follow up [date and questions to revisit]

Still missing [item, owner and date it will be ready]