

Appendix 1: Handover Checklist

Handover Checklist			
Item	Person Responsible	Actions/comments	Date completed
Book onto committee roles and responsibilities training	All		
Completed paperwork in respect of Ofsted and DBS forms	All		
Read the constitution	All		
Roles and responsibilities explained	All		
Chair, treasurer and secretary job descriptions shared	All		
Sign the confidentiality agreement/ E-safety policy	All		
Know the registered charity number and password	All		
Meeting dates shared	All		
Minutes of previous meeting and actions	All		
Policies and procedures shared	All		
Share any development /action and business plans	All		
Added DBS numbers to the central records	Secretary		
Sign up to receive NCC newsletters	Secretary		
Update records with charity commission	Secretary		
Transfer and handover of financial records including financial audit, details of current and previous funding applications, current budget, end of year accounts	Treasurer		
Gain NCC portal log in details	Treasurer		
Details of any legal documents	Treasurer/Chair		

Bank account including bank statements and signatories	Treasurer		
Renewal dates e.g. Insurance, rental agreements, professional memberships	Treasurer		
Staff salary details explained along with payment dates and details	Treasurer		
Staff structure shared ie, manager & deputy	Chair		
Share manager's last supervision records including any actions set	Chair		
Staff training matrix shared	Chair		
Inform NCC via the advice line of the new chairperson's name and contact details	Chair		
AGM dates, processes and paperwork shared	All		