**Exec Handover Template 2021**



Contents

[Why is a handover important? 2](#_Toc66783643)

[Society objectives 3](#_Toc66783644)

[Exec roles and responsibilities 4](#_Toc66783645)

[Useful contacts 6](#_Toc66783646)

[Login details and important documents 7](#_Toc66783647)

[Ongoing society projects 8](#_Toc66783648)

[Equipment inventory 9](#_Toc66783649)

[Year planner 10](#_Toc66783650)

[Society finances and budget 11](#_Toc66783651)

[Top tips and other useful information 12](#_Toc66783652)

# Why is a handover important?

One of the first tasks to complete as new Society Exec members is a handover with the outgoing Exec members. This is crucial to ensure you have a good understanding of how the society operates and you know how to access everything that you will need.

We suggest that you **organise a Teams meeting** with both the incoming and outgoing Exec to discuss aspects relating to running the society.

**A handover should include:**

* Description of your Exec roles and society activities
* List of useful contacts
* Shared files, incl. committee minutes, logos, project plans
* Passwords (emails/social media/online accounts)
* Inventory of any equipment, kit, etc. you have and where it is stored
* Society projects – completed, ongoing, plans/ideas
* External paperwork you may have, incl. sponsorships
* Top tips for overcoming challenges throughout the year
* Transfer of the bank account signatories

Re-affiliation is designed to ensure that society handovers are completed however it is up to you to make this as successful as possible.

We have a **handover template** to help you get started in creating a successful handover. While we ask you to complete this as part of the re-affiliation process, this guide/template is designed to help you run the society effectively next year. The more information you get through handover, the easier it will be to run your society. The template is designed as a starting point, you may not need to complete all of the sections and you may wish to add other sections, you will need to tailor this to your society needs.

# Society objectives

*Having a clear understanding of what you want to achieve as a Society for the upcoming year will allow you to plan your activities and events more easily.*

**Objectives:**

# Exec roles and responsibilities

*Defining what each individual member of the Exec team does is important to being able to run your society effectively ensuring that everyone has a clear understanding of what others members of the Exec do.*

*The table below should give you a good starting point in defining the role of each Exec member. Discuss each of the roles and name their key responsibilities. The outgoing Exec may be able to provide feedback about what worked well and what may need to be changed.*

*We recommend that you organise role specific 1-1 meetings for the new and outgoing Exec to discuss their role in more depth.*

**Roles and responsibilities:**

|  |  |  |
| --- | --- | --- |
| **Role** | **Responsibilities** | **Key tasks** |
| President |  |  |
| Treasurer |  |  |
| Secretary |  |  |
|  |  |  |
|  |  |  |

**Other useful information:**

# Useful contacts

Please add in any key contacts that will be useful for your incoming exec team throughout the next year; suppliers, sponsors, colleges, officers. As an outgoing exec member you may wish to consider including yourself as a key contact for the new exec team.

We have included your key Union contacts below.

|  |  |
| --- | --- |
| Societies Team | Available to answer questions relating to Society activity.  Email [help@lancastersu.co.uk](mailto:help@lancastersu.co.uk) |
| Patrick James | The Societies Coordinator, your lead contact for operational support. Available to help with any issues that you may encounter as a society or in the planning of large events and activities.  Email [p.james1@lancaster.ac.uk](mailto:p.james1@lancaster.ac.uk) |
| VP Societies and Media | Your lead representative officer at the Union, there to listen to your ideas, your concerns and support with campaigns and change initiatives. Email [su.vp.societiesandmedia@lancaster.ac.uk](mailto:su.vp.societiesandmedia@lancaster.ac.uk) |
|  |  |

**Join the Society Federations in Teams!**

All of our society's federations are connected online through their own dedicated Teams space. Here you can connect with 100’s of exec members, share your events and successes, and keep up to date with news and Union communications.

[**Join the Federations Team Here**](https://teams.microsoft.com/l/channel/19%3ad8c4953da94042398eb0e718c61f0bea%40thread.tacv2/News%2520and%2520Events?groupId=821783ba-93c1-4fa0-8c3e-86d9e8e86d4d&tenantId=9c9bcd11-977a-4e9c-a9a0-bc734090164a)

# Login details and important documents

*Record the places where all important documents are stored as well as login and password details for any accounts that are linked to the society e.g. social media accounts. It will be useful for the new Exec to have access to the minutes from past meetings. Note that access to the group’s @lancaster email account will be given automatically once an Exec member has completed the online data protection training and is registered as an Admin on Union Cloud.*

|  |  |  |
| --- | --- | --- |
| **Document** | **Contents** | **Stored in:** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Platform** | **Link to Login** |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Login Details**

Ideally, login details and passwords should not need to be shared and everyone would have their own unique account/login. Where this is not possible you should ensure that these details are passed over securely and that this information is removed or deleted when it is no longer needed.

1. Share a document in Teams or OneDrive with the specific exec member(s) that require this information.
2. Teams Chat – You can send instant messages in Teams which are secure and can be deleted by the sender afterward.

# Ongoing society projects

*Are there any ongoing projects the next Exec will need to be made aware of? Record important details about these projects and where more information can be found.*

# Equipment inventory

*Does the society have any equipment? Record this below including where the equipment is stored. It will help you identify whether any equipment needs replacing which you may need to factor into your yearly budget. If you have equipment stored in Slaidburn you will need to update us with the new Exec’s details by completing the Slaidburn access form.*

|  |  |  |
| --- | --- | --- |
| **Equipment** | **Quantity** | **Stored in:** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Year planner

*Include the details of events that you are already planning to run in the year planner below. This will help you create a budget for the year.*

|  |  |
| --- | --- |
| **Week number** | **Event** |
| Week 1 | *Freshers Fair* |
| Week 2 |  |
| Week 3 |  |
| Week 4 |  |
| Week 5 |  |
| Week 6 |  |
| Week 7 |  |
| Week 8 |  |
| Week 9 |  |
| Week 10 |  |
| Christmas Break |  |
| Week 11 | *Refreshers fair* |
| Week 12 |  |
| Week 13 |  |
| Week 14 |  |
| Week 15 |  |
| Week 16 |  |
| Week 17 |  |
| Week 18 |  |
| Week 19 |  |
| Week 20 | *Re-affiliation opens* |
| Easter break |  |
| Week 21 |  |
| Week 22 |  |
| Week 23 |  |
| Week 24 |  |
| Week 25 |  |
| Week 26 |  |
| Week 27 |  |
| Week 28 |  |
| Week 29 |  |
| Week 30 | *Re-affiliation deadline* |

# Society finances and budget

*Planning out your expenditure for the year will help you decide what your membership fee should be and will ensure that you have enough money to run the events you would like to. You may want to create a budget in a spreadsheet and include a screenshot. To help you get started, you may wish to use* [*this template*](https://help.lancastersu.co.uk/a/solutions/articles/11000101351)*.*

*Some tips:*

* *Breakdown each event or activity to ensure you have an accurate estimate of the cost e.g. how many would attend, what materials would you need, where will the event take place and how will you promote the event. Get multiple quotes to ensure you are getting a good price.*
* *Agree an annual budget as an exec*
* *Ensure that you plan to have some additional money in your account in case things don’t go to plan!*

*You will also need to transfer you bank account to the new Exec and complete the* [*bank account registration form*](https://lancasteruni.eu.qualtrics.com/jfe/form/SV_9AkjHlL5SLSdWRf)*.*

**Completed budget:**

(This can either be pasted in this document, or you can provide a Teams/OneDrive link for your exec to access)

# Top tips and other useful information

*Below is a list of question prompts that may help when you find out more about your new Exec role, the society and how you can make this year the best one yet for your society. Note down anything else that you think will be useful in running the society for the upcoming year.*

***Question prompts***

* *What went well this year?*
* *What could have gone better?*
* *Top tips for how to make the most out of your exec position?*
* *What barriers did you face this year?*
* *What do you wish you knew before starting your position?*
* *Are there any special dates or events which you run every year? If so when are these and why are they important to your society?*
* *The day in day out tasks you have to do within this role. Do you have any big or small events which this role is in charge of organising? Where does your successor start with these events? Who will they need to liaise with?*