Society Handover

Congratulations on completing your year as a Society Committee Member! Your role runs until 31st July, at which point, the incoming committee will take over.

We have put together this handover document for you to complete and share with your new committee; you will have spent this year gaining valuable experience while running your society and it will be beneficial to the new committee and future members for you to pass your knowledge onto them before you leave your post. This will give your society the best start possible and it will also reassure your new committee members that they have a good understanding of how to do their role.

Please send a copy of this document back to us at [saadmin@liverpool.ac.uk](mailto:saadmin@liverpool.ac.ukd) and share with your incoming committee. You can find their names on the elections results page which will be published on the Guild website, and you can find their emails in the email address book.

Remember that this document is only one part of the handover process and that you should help the new committee however you can, by ensuring all your committee documents on your society’s Google Drive and talking them through regular tasks such as accessing emails, completing Event Cover Forms, Risk Assessments, Payment Vouchers, and taking minutes. All committee members should be involved in the handover so that you each pass on your specific knowledge. You may choose to meet with the new committee to talk them through the handover. A staff member from the Societies Team can sit in on your handover meeting to assist with a smooth transition from outgoing to incoming committee, if you think you would benefit from this support. Get in touch with your coordinator if this is something you are interested in!

**To do list for outgoing Committee members:**

* Complete a written handover, following the template below
* Arrange a handover meeting between outgoing and incoming committees
* Organise meetings with regular contacts to introduce the new committee.

|  |
| --- |
| **What makes a good handover** |
| * Describing the journey of the year * Highlights of the year * Sharing the skills you have gained * Sharing the lessons you have learnt * Continuing long term planning * Making sure your achievements are carried on into the future * Preparing the new committee for their roles * Ensuring the new committee has all the relevant information they require e.g. passwords, Society Storage inventory etc. * Providing the new committee with relevant knowledge, skills and contacts |

**Useful tips:**

* Think about the individual you are handing over to. Do they have specific knowledge or experience already? Tailor your handover to their needs.
* Don’t leave the handover to the last minute, you will forget important information!
* Ask your Society Coordinator for help if you need it.
* Provide written information alongside your handover meeting. You may have a lot of information to transfer and your successor may not remember everything.
* Acknowledge the fact that it is up to the new committee if they choose to do things differently or take a different direction.
* Once the handover is complete, let the new committee find their way – they can always contact you if they need help.

**President and Vice President Handover:***To be completed by the President. If you have a Vice-President or Co-President, they should also complete a copy of this section in addition to the President.*

**Background of your society**

*Please give a description of the background of your society and the journey so far*

**How would you describe the role of a President/Vice President?**

|  |  |
| --- | --- |
| **What are your tasks?** | |
| **Daily** |  |
| **Weekly** |  |
| **Monthly** |  |
| **Each Semester** |  |
| **Annually** |  |

What were the goals set for the society this year?

Did you achieve them? How?

Were there any challenges? How did you overcome these?

What ideas did you have that you were unable to implement?

What are your long-term goals for the society? What steps have you taken this year to achieve them? Can you think of any next steps?

How many members signed up this year?

Were you pleased with the number of members in your society?

How could you promote your society to a wider audience?

Did your society fundraise this year? How much did you raise? What charities did you fundraise for?

Did you run any Societies in Schools sessions? What did you do? How did it go?

Did your society run any campaigns this year? What did you do? How did it go?

Did your society host any Give it a Go events? What did you do? How did it go?

Did your society win any Guild Awards? What did you win?

**Key information to pass on:**

* Pass on any passwords for email account, external websites, and social media
* Provide advice on any unanswered emails or post
* Provide advice on any outstanding tasks
* How to complete an [Event Cover Form](https://surveyhero.com/c/pir3k7dw)
* Reminding incoming committee to attend society training in early semester 1 to help cement their knowledge!

**Secretary Handover:**

*To be complete by the Secretary*

**How would you describe the role of a Secretary?**

|  |  |
| --- | --- |
| **What are your tasks?** | |
| **Daily** |  |
| **Weekly** |  |
| **Monthly** |  |
| **Each Semester** |  |
| **Annually** |  |

**Society inventory:**

Think about the items/equipment that your society owns and complete the inventory below. This includes both physical items and virtual items (such as online games on the Society’s Steam account). The Guild has an inventory of items in the main society storage space from summer 21/22. Please contact [saadmin@liverpool.ac.uk](mailto:saadmin@liverpool.ac.uk) if you would like a copy of our inventory. You are likely to have purchased additional items since then or may have items stored elsewhere. Please make sure to add these to your inventory. (If you have a large inventory, you can complete this as a separate document, to be shared with the new committee and your Society Coordinator):

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Quantity** | **Location** | **Notes** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Key information to pass on:**

* Minutes from any committee meetings
* Pass on any passwords for email account, websites and social media.
* Advice on any unanswered emails or post
* Advice on any outstanding tasks
* [How to take minutes](https://nusdigital.s3.amazonaws.com/document/documents/76326/17543dda6ee14ef45e830f7c779eb934/How_to_take_Minutes_Updated_2122.docx)
* How to complete an [Event Cover Form](https://surveyhero.com/c/pir3k7dw)

**Treasurer Handover:**

**How would you describe the role of a Treasurer?**

*To be completed by the Treasurer*

|  |  |
| --- | --- |
| **What are your tasks?** | |
| **Daily** |  |
| **Weekly** |  |
| **Monthly** |  |
| **Each Semester** |  |
| **Annually** |  |

What is the account balance for the society currently?

Did the society make or lose money this year overall?

Are there any outstanding payments to be made or invoices to be settled?

Are there any large recurring events that your society might want to save up/fundraise for?

Did your society apply for funding from Spend It this year? What did you bid for? Was your bid successful? Did you spend all of the money?

Did your society work with any sponsors this year? Who was your sponsor? What money/items did you receive? Did they get involved in any society activity?

**Key information to pass on:**

* Pass on any financial documents including your financial report from your Annual General Meeting.
* Pass on any passwords for email accounts, websites, and social media.
* Provide advice on any unanswered emails or post
* Provide advice on any outstanding tasks
* How to complete a [budget document.](file:///C:\Users\emilyw\Downloads\AGM%20Presidential%20Report%20Template.docx)
* How to get an account statement.
* How to complete a [Payment Voucher](https://www.liverpoolguild.org/resources/society-pv/download_attachment)
* How to complete an [Event Cover Form](https://www.liverpoolguild.org/resources/online-activity-form/download_attachment)

**General Committee Handover:**

*Each General Committee Member should complete a copy of this section*

**What is the title of your role?**

**How would you describe your role as a committee member?**

|  |  |
| --- | --- |
| **What are your tasks?** | |
| **Daily** |  |
| **Weekly** |  |
| **Monthly** |  |
| **Each Semester** |  |
| **Annually** |  |

What was your highlight of the year?

What skills did you gain and what lessons did you learn?

**Key information to pass on:**

* Pass on any password for email account, websites, and social media.
* Provide advice on any outstanding tasks
* How to use the Guild website
* How to complete an [Event Cover Form](https://www.liverpoolguild.org/resources/society-pv/download_attachment)

**Events and activities (to be completed by any committee member):**

*You can allocate this section to one person or work together to complete this section*

**What were your society’s regular events/activities/meetings this year?**

|  |  |
| --- | --- |
| **Key events** | |
| September – December |  |
| January – March |  |
| April onwards |  |

**For each key event/activity outline the following:**

Name of event:

Date:

Venue/Platform used:

Description of event:

How many attended:

Cost of tickets:

Name and organisations of any guest speakers:

When did you start planning:

Who was in the planning team:

What was your budget:

Activity related purchases:

*(eg costs of prizes, guest speaker fees, teacher fees, virtual tickets, etc )*

How did you fund the event: (Ticket sales? Did you need to fundraise? Did you get sponsorship? Did you go to Spend it?

Useful contacts:

|  |  |
| --- | --- |
| **SWOT Analysis of events:** | |
| **Strengths**  (What went well) | **Weaknesses**  (What was challenging) |
| **Opportunities**  (What could be even better) | **Threats**  (What to watch out for next time) |

**Marketing your society:***You can allocate this section to one person or work together to complete this section*

What have you found to be the best way to communicate with your members?

What communications are your members less receptive to?

Do you have any good logos/images that you like to use?

What activities did your society host for Welcome Week? How did it go? Do you have any tips?

What did your society do to welcome new students in January? How did it go? Do you have any tips?

**Key contacts:**

**Key contacts at the University:**

Name:

Role:

Email:

**Key contacts at the Guild**

Name:

Role:

Email:

**Other key contacts** (e.g. chaplains, affiliated organisations)

Name:

Organisation:

Role:

Email:

**New Committee To Do list:**

We have put together a handy list which will help the new committee to get started:

* Receive handover from previous committee member. Make sure you understand everything and ask your society coordinator/previous committee members about anything you are unsure of.
* Complete Society Re-registration (your Society Coordinator will be in touch with instructions about re-registering your society)
* [Read the society handbook](https://www.liverpoolguild.org/main-menu/societies/society-handbook)
* Ensure you can [log in to society emails](http://mail.society.liverpoolguild.org) and social media – if you are struggling to gain access, please email us at [saadmin@liv.ac.uk](mailto:saadmin@liv.ac.uk) and we should be able to help
* After August 1st, join your society page via the Guild Website to become a member
* Once you are a registered member, email [saadmin@liverpool.ac.uk](mailto:saadmin@liverpool.ac.uk) with your name, society name, committee role and University email address and ask for admin rights for the Guild website so you can access your society webpage where you can change your society description, logo, and update pages, as well as checking on your membership numbers
* Look out for emails from your Society Coordinator inviting you for an initial meeting
* Look out for an email inviting you to be a part of Welcome Week.
* Look out for an email inviting you to attend compulsory Society Committee Training