



CLUB & ASSOCIATION HANDOVER

ABOUT THIS DOCUMENT

This document provides reference material that may be useful in handing over your Club/Association to next year's Executive, and helping them prepare for the new year.

Within this document you will find the following:

- Checklist for running your Annual General Meeting
- Checklist to organise the transition of your Club/Association's management from the outgoing executive to the newly elected executive (aka, the formal "Handover")
- Checklist for the incoming Executive to prepare for the new year
- Checklist for the preparation of the Club/Association's O'Week stall
- Form to record the contact details of the outgoing Executive members
- Form to record the contact details of the incoming Executive members
- Form to record Club/Association-owned account details (e.g: bank account, Facebook page, etc.)

Please note that this document should be used as a general guide only. More specific processes and requirements may be detailed within your Club/Association's governing documents (Constitution, Position Descriptions, etc.).

For more information on managing your Club/Association, head to fusa.edu.au/manageclub and refer to the following sources:

- *Clubs & Associations Handbook - See Guides & Information*
- *CLUBFAQ - See Frequently Asked Questions*
- *Clubs, Collectives & Academic Associations Regulations - See Rules & Regulations*

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ANNUAL GENERAL MEETING

Executive decides date and time selected for Annual General Meeting.

FUSA Event Registration Form completed to book room, booking confirmed by FUSA.

Membership contacted given notice of Annual General Meeting at least one week beforehand.
Request members to provide agenda items and nominate for executive positions (provide deadline).

General Secretary given notice of Annual General Meeting via clubs@flinders.edu.au at least one week beforehand (longer if required in Club/Association Constitution).

Returning Officer collates nominations for executive positions and announces to members.

Draft meeting agenda (template available on Manage Your Club). Motions to accept proposed amendments to constitution (if applicable), motion to remain affiliated with FUSA, motion to change bank account signatories to new executive.

Finalise agenda and send to members.

Executive to draft and finalise Annual Report of Club/Association activities.

Treasurer to draft and finalise Financial Report.

Print agenda and reports. Print minutes template if a laptop is not available.

Print election ballot slips (for positions with more than one nomination).

Record full names of those in attendance at Annual General Meeting.

Nominate minute taker (Minutes template available on Manage Your Club).

Present/discuss reports and items per agenda, run elections for executive positions.

Exchange contact details between incoming/outgoing executive members.

Email minutes of meeting to membership and clubs@flinders.edu.au.

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FORMAL HANDOVER

- Elect new executive members via Annual General Meeting of membership.
- Email clubs@flinders.edu.au with details of incoming executive (full name, executive position, phone number, email address and Flinders student ID number).
- Treasurer to ensure all outstanding payments to and from the club/association have been paid/received (e.g: outstanding invoices, reimbursements to members).
- Treasurer to bank all petty cash, cheques, etc. and ensure all income is recorded in financial records.
- Treasurer to collate all tax invoices and receipts, scan physical receipts and keep with receipts from previous years. Ensure receipts/invoices are clearly marked with purpose (e.g: BBQ 22/3/18) and ensure they match recorded expenditure in financial records.
- Treasurer to check that all income and expenditure matches bank records.
[bank balance start of year] + [income] + [expenditure] should equal [current bank balance] if income/expenditure has been paid/received and recorded correctly.
- Outgoing executive to upload relevant agendas/minutes, membership list, financial records and other documents/media to private online storage (e.g: Google Drive, etc.). Physical documents/records scanned and uploaded where possible.
- Outgoing executive to organise access to online storage and provide physical documents/records to incoming executive.
- Access to email account(s) and mailing list to be provided to incoming executive. Incoming executive to remove access from outgoing executive.
- Outgoing executive to provide Admin access to all social media and web sites (if applicable) to incoming executive. Incoming executive to remove access to outgoing executive members.
- At least one current bank account signatory to attend bank with incoming executive members to add/remove bank account signatories as required. Note: bring minutes of AGM and 100 points of identification. Check with bank prior to visit for additional requirements.
- Outgoing executive returns any Club/Association assets in their possession to storage (or incoming executive if the Club/Association has not applied for a locker yet).
- Locker pin code provided to incoming executive. Swipe card access form (see Manage Your Club) completed to provide incoming executive with access to storage room.
- Organise meeting with incoming and outgoing executive members to provide an overview of the previous year, their responsibilities, processes, recommendations & advice, things to be improved on, etc.

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O'WEEK STALL PREPARATION

- Create roster for O'Week. Ensure both bump-in, event and bump-out are rostered. Ideally, at least 2 members should be rostered at all times.
- Email roster to applicable members. Confirm the mobile numbers for all rostered members (you may need to contact them directly during the event).
- After rostering, register days the Club/Association can run a stall via the O'Week Booking Form which will be distributed in the months leading up to
- Confirm details of event/activity to engage new & existing members (preferably in week 1 or 2).
- Design attractive signage/promotional materials for the stall that prominently displays the Club/Association's name and logo, e.g. tablecloth, posters
- Print photos or organise videos of previous events/activities to display on the stall.
- Create pamphlets advertising the Club/Association's social media and the first event/activity of year.
- Determine how the stall will attract attention, e.g. a demonstration, a competition for new members, etc.
- Send reminder to rostered members the week before O'Week stall. Confirm they are still attending.
- Organise promotional material for Club/Association's O'Week stall. Create stall signage and pamphlets advertising the Club/Association's first event.
- Place all stall equipment and printed material in Club/Association's locker or another accessible space. Ensure all rostered members are aware of location and have access.
- Ensure all rostered members are emailed O'Week information (site maps, stall locations, etc.), and have completed the online Event Induction Form at fusa.edu.au/eventinduction
- Run O'Week stall, recording the details of new members (full name, date of application, email address and student number). Hint: save time on data entry by recording details electronically rather than via paper form.
- Secretary to record all new members' details in electronic membership list (Excel format) as soon as possible. Email all new and existing members as soon as possible to promote first event/gathering of year.
- After event (and each consequent event), email members to advise of next event/activity. Maintain ongoing social media/email communication throughout club/association's event schedule.

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OUTGOING EXECUTIVE

Don't lose touch! Outgoing Executive should fill in the form below and provide copies to your incoming Executive.

PRESIDENT NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

VICE-PRES. NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

SECRETARY NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

TREASURER NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

POSITION:

FULL NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

POSITION:

FULL NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

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INCOMING EXECUTIVE

Don't lose touch! Incoming Executive should in the form below and provide copies to your outgoing Executive.

PRESIDENT NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

VICE-PRES. NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

SECRETARY NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

TREASURER NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

POSITION:

FULL NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

POSITION:

FULL NAME:

PERSONAL EMAIL:

MOBILE NUMBER:

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CLUB/ASSOCIATION ACCOUNTS - CONFIDENTIAL

The outgoing Executive should provide the details of the Club/Association-owned accounts below.

The incoming Executive should change the passwords for these accounts as soon as possible.

Destroy this document securely ASAP once all passwords have been changed and confirmed working.

BANK INSTITUTION:

ACCOUNT NAME:

BSB NUMBER:

ACCOUNT NUMBER:

NET BANKING PASS:

CLUB EMAIL:

PASSWORD:

FACEBOOK URL:

USER NAME:

PASSWORD:

SERVICE/URL:

USER NAME:

PASSWORD:

SERVICE/URL:

USER NAME:

PASSWORD:

SERVICE/URL:

USER NAME:

PASSWORD: