

HANDOVER GUIDE FOR P&F OFFICE BEARERS



Tick	Action
	The outgoing President/Vice President/Secretary/Treasurer/School Advisory Council Representative may consider writing a welcome letter and include a list of duties and responsibilities of their position. Make sure to include any additional administrative duties, including preparation of P&F newsletter articles, maintaining computer access or files for the P&F, checking mail and managing both electronic and hard copy versions of correspondence that needs to be tabled. If there is a code of conduct, this could be included with the letter
	Provide a meeting schedule for the year and a calendar of important events (e.g. functions, Sacraments, Masses). Ensure the incoming Office Bearers have access to information about the regular yearly P&F events, and any new events that have been voted on in the previous year. Ensure the new CSPWA Representative is provided with the contact details of CSPWA and overview of the regular events and services provided by CSPWA throughout the year. (e.g. School Parent Induction, Awards of Excellence, Conference, Parent Reference Groups, School visits).
	Ensure access to the P&F email account is made available to incoming Office Bearers, and provide any other passwords or logins (e.g. Dropbox, OneDrive or Teams). Provide details of P&F email distribution lists and where to collect incoming P&F correspondence in preparation for the meetings (in-tray, pigeonhole, email account, front office etc). Assist the incoming CSPWA Representative and other members of the executive to subscribe to the CSPWA mailing list and support them to understand the process of tabling the CSPWA information at P&F meetings. Provide information on the Affiliation process and support provided by CSPWA to the school. Ensure bank details are made available to the incoming treasurer, with change of Bank Signatories form to be signed by the relevant Office Bearers.
	Ensure all financial records are finalised, balanced, collated and made available, prior to Annual Community Meeting in anticipation of handover. The records must also be saved electronically. Ensure budget and reserve allocations have been decided by the P&F at the end of the current year and provide this information/report to the incoming Treasurer. Ensure all meeting and event notes are finalised and the ACM minutes are entered within 30 days of holding of the ACM in a minute book or electronic file. Provide a copy of the recent ACM minutes to new Office Bearers.
	Have copy of "The Effective P&F" from CSPWA available, that explains the roles of each of the Office Bearers. Inform incoming members of the CSPWA School Parent Association Induction to gain an understanding of each role: https://www.parentassociation.com.au/login
	Have a copy of the current P&F Constitution available for all incoming Office Bearers, and a copy of the Catholic School Advisory Council Terms of Reference for the incoming School Advisory Council Rep.
	Prepare a list of contacts for assistance (e.g. Principal, CSPWA, Department of Racing, Gaming and Liquor). Where possible, set up an introductory meeting for the incoming Treasurer with the School Bursar or Business Manager.
	Prior to the end of the year, meet with the Principal to find out if there is a "wish list" for fundraising goals and ask to schedule a "planning meeting", as it is important that the parent group understand the priorities for the school. If the outgoing Office Bearers are unable to hold the meeting prior to the end of the year, support the incoming Office Bearers to schedule a meeting with the Leadership Team and School Advisory Council before the first P&F meeting, to clarify the goals and objectives for the school in the coming year, and how the parent group can assist in helping the school achieve those goals.
	Prepare the new Office Bearers form for CSPWA (on our website) and follow our Facebook page.
	Where possible, attend and provide support at face-to-face handover meetings for other Office Bearer positions.