

2. Information Handover Template

Purpose of this document: To record what information the new facilitator needs to know in their new role. Collect this information on the template, and use it as a guide to be sure that all operating information about the group is passed onto the new facilitator.

What	Who	Where	Indicate Completed
Compile procedures and processes for how the group operates.	Facilitator or Secretary	Pass on to new Facilitator. Store this information where it is accessible to everyone in the group (e.g. in the cloud). Include file paths for locations of electronic records.	
Compile a list of group members and contact details, keeping in mind that this information is confidential.	Facilitator or Secretary	Pass on to the new Facilitator. Store this information where it is accessible to everyone in the group.	
Compile a list of external contacts and introduce the incoming facilitator to key supporters and/or funders, sponsors, venue hire manager, networks, etc.	Facilitator or Secretary	Pass on to the new Facilitator. Store this information where it is accessible to everyone in the group.	
If the incoming facilitator is not already known to everyone in the group, introduce them.	Facilitator	In person, by mail or email or an online forum.	
If your group is an online group, such as Facebook, provide passwords and other details for the administrator operating the account.	Facilitator/ Administrator	In person, by email.	
If the Facilitator is a signatory to the group's bank account, complete necessary documentation of change.	Facilitator/Secretary Treasurer	In person.	
Pass on formal group information such as ABN, and insurance details and complete any changes needed to transfer access to the new facilitator.	Facilitator/Secretary Treasurer	In person, by email.	
Pass on location of other details you might have on record.	Facilitator		