HANDOVERS

Key points

- Handovers are a vital way to ensure charity continuity, to properly manage change and to prevent the loss of key charity knowledge.
- Handovers are especially important for small charities given they are likely to be solely run by volunteers (compared to larger charities with paid employees).
- Handovers and inductions should go hand-in-hand. Your charity should ensure vital information is passed on during handover so that your induction process can then use this information to further clarify the role and responsibilities the newcomer has.
- This process should be carried out in a thoughtful, orderly way so new arrivals are equipped to do the job without suffering from information overload.
- A guide or checklist can help your charity through the handover process.

Why are handovers important?

Having a handover process for when a board member, volunteer, staff member or other key personnel leave your charity:

- allows you to complete a smooth transition through a period of change
- ensures valuable organisational knowledge is not lost, and is in fact passed on effectively
- helps newcomers to hit the ground running

Any role in your charity that carries with it some responsibility and institutional knowledge should be subject to a handover process.

And for small charities, handovers are even more crucial.

Small charities are far more likely to have important knowledge or numerous roles shared among fewer people. And these people are more likely to be volunteers. If any of these people leave the organisation, the impact of the lost knowledge can be devastating if there are no proper handovers.

A handover can be viewed as a combined briefing and training session – a "passing of the torch" which enables the newcomer to operate at maximum effectiveness from the start.

Australian Government

Australian Charities and Not-for-profits Commission

Handovers and inductions

Your charity's handover process should work hand-in-hand with its induction for incoming board members, staff or volunteers.

In fact, the best handover can be viewed as a key introductory step in your charity's wider induction process.

The information and material conveyed during a handover should build a solid foundation upon which your more structured and detailed induction process occurs.

Handovers should be well managed

Your charity should prepare handover materials well in advance. This should include written notes:

- describing the key responsibilities of the outgoing person
- detailing their day-to-day tasks and duties
- looking at key systems or applications they use, as well as major projects they look after
- sharing contact numbers, passwords, charity access information (to bank accounts, or to the ACNC Charity Portal)

Of course for small charities, where a smaller number of people are likely to carry a larger number of responsibilities, these written notes might be quite extensive and lengthy. If so, double-check them to ensure you haven't overlooked anything, even if it appears to be minor.

This information should be handed over in an orderly way – document the process or work through a checklist.

The handover should also see your new arrival meet face-to-face with the person leaving your charity. Have them spend time together – even consider having your new arrival come in early and 'shadow' the person they are taking over from.

Make handovers part of the 'culture'

It is important that the person leaving your charity knows that they will have a role to play in any handover process for their role.

That way, if someone from your organisation announces their exit, they can play an active role in any handover that will occur.

Your charity shouldn't have someone leave without ensuring the knowledge and vital information they have is passed on.

More information

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acnc.gov.au/smallcharities