



# Handover Guide for Office Bearers

*'It's not how much we give, but how much love we put into giving'.*

*Mother Teresa*

- The outgoing Chair/Deputy Chair/Secretary/Treasurer/School Advisory Council Representative may consider writing a welcome letter and include a list of duties and responsibilities of their position. Please see the CSPWA resources on role descriptions to help. 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. This information should be available through the P&F annual budget or event plan. ☐
- Ensure the new CSPWA Representative is provided with a calendar of events 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). Assist the incoming CSPWA Representative 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 access to the CEWA approved P&F email address is made available to the incoming Chair**, 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). ☐

- Ensure all financial records are finalised, balanced, collated and made available, prior to ACM in anticipation of handover. The records must also be saved electronically. Ensure budget and reserve allocations have been decided by the parent group 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 Annual Community Meeting minutes are distributed within 30 days of holding of the ACM. Provide a copy of the recent ACM minutes to new Office Bearers. ☐
- Have copy of "The Effective P&F" from CSPWA available. Inform incoming members of the CSPWA Parent Induction, offered in person at the beginning of the year, and as a series of modules available online: [www.csp.wa.edu.au/resources](http://www.csp.wa.edu.au/resources). ☐
- Have a copy of the current P&F Terms of Reference available for all incoming Office Bearers, and a copy of the Catholic School Advisory Council Terms of Reference for the incoming School Advisory Council Representative. ☐
- 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. ☐
- Provide the names and contact details of your school's Local Members (State and Federal Parliament, senators, and local councillors) to the incoming Office Bearers. If you do not have a copy of this information, please contact the CSPWA office. ☐
- 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. ☐