

CLUB & SOCIETIES HANDOVER

ABOUT THIS DOCUMENT

This guide is designed to support your club through handover – making it easier to pass on knowledge, responsibilities, and resources to your incoming committee so they're ready for the year ahead.

Inside, you'll find:

- Checklist for running your Annual General Meeting (AGM)
- Checklist to help with the formal handover from outgoing to incoming executives
- Checklist of OUSA Re-Affiliation requirements
- Checklist for incoming committees to prepare for the new year
- Checklist for O'Week Clubs Day stall preparation
- Forms to record contact details of outgoing and incoming executives
- A form to record club-owned accounts and logins (e.g. email, Facebook page, Instagram etc)

Please note: this guide is intended as a general reference only. Each club is unique, and your Constitution, role descriptions, or other internal processes may include additional requirements.

For more resources and information on managing your club, head to the OUSA Clubs & Societies website: ousa.org.nz/clubsandsocs

or refer to the following sources:

- The Clubs & Societies Handbook
- Clubs & Societies Policies

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ANNUAL GENERAL MEETING

- ☐ **Check your constitution:** Your club's constitution sets the rules for your AGM. Things like how much notice you need to give, what quorum (the minimum number of members needed to conduct business) you need to meet, and how voting works. Read it before you plan anything else.
- ☐ **Set the date:** The executive decides when and where.
- ☐ **Give notice:** Let members know at least 2 weeks out. Ask them to send through agenda items and nominate for executive positions.
- ☐ **Draft the agenda** (template in the portal): Standard motions to include, where relevant:
 - Accept proposed amendments to the constitution
 - Remain affiliated with OUSA
 - Change bank account signatories to the incoming executive
- ☐ **Send the agenda in advance:** Members should know what's being discussed before they walk in. Share the agenda and the previous AGM's minutes ahead of time, ideally at least a week out.
- ☐ **Record attendance:** full names and student IDs (if applicable) of everyone present.

Work through the agenda:

- ☐ • **Welcome & apologies:** The Chair opens the meeting and welcomes everyone. The Secretary lists apologies from anyone who couldn't make it – members, officers, or anyone else expected to attend.
- ☐ • **Quorum check:** Before any business can happen, confirm you've met quorum (check your constitution). If you haven't, the meeting generally can't proceed to formal business
- ☐ • **Previous minutes:** Distribute the minutes from last year's AGM if you haven't already. Ask if any amendments are needed, then put it to a vote
- ☐ • **President's report:** overview of the year: membership numbers, key events, wins, thanks. Open the floor for questions, then move, second, and vote to accept.

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ANNUAL GENERAL MEETING

- ☐ • **Treasurer's report:** share the financial report and event budgets.
- ☐ • **Questions from attendees:** General Q&A time for anything not already covered in the exec reports.
- ☐ • **Constitution changes:** If any – Each proposed amendment needs to be moved, seconded, and voted on individually, with the outcome recorded in the minutes. Worth switching to the new constitution template if you haven't already.
- ☐ • **Elections:** This is often the main event. For each role –
 - Open nominations (self-nominations are fine, but need a seconder)
 - Give nominees a chance to speak
 - Vote – by ballot if possible, so it's anonymous
 - Record full names for the nomination, seconder, vote count, and outcome for every role
- ☐ • **New bank signatories:** sign the new forms and record the changes. Bank's will likely need to see this information along with election process for a smooth change of signatories on the club bank account.
- ☐ • **General business:** cover off any remaining odds and ends.
 - Update the asset register: list club items and their value.
 - Membership fees & costs: decide these for next year.
 - Event ideas: take a good moment to start thinking ahead and set the incoming committee up for success.
 - Incoming committee: talk through tasks and arrange time handover of resources.
- ☐ • **Meeting close:** Thank everyone for coming, confirm there's no further business, and formally close the meeting (note the time).

Once your AGM wraps up, there's a few things to tidy up: finalise and share the minutes with your full membership (including anyone who couldn't attend), update your official records with the new committee names, roles, and any constitutional amendments, and start your re-affiliation application. If your committee has changed, kick off the handover as soon as you can, especially for treasurers or anyone dealing with the bank!

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FORMAL COMMITTEE HANDOVER

A smooth handover between outgoing and incoming committee members is so important to keeping your club running well. Ideally, this happens soon after your AGM. Momentum is easiest to lose in the time when an old committee is stepping back and a new one finding its feet.

Your handover should include general information about the role, plus any tips that will help the new committee avoid confusion when they start up again in the new year. Written notes, a handover meeting, or both can be really helpful.. especially for things specific to your club or that aren't easy to find with a quick Google.

General Administration – what to hand over

- ☐ **Logins and passwords:** Share everything the role needs – email, social media, Clubs Portal, shared drives, and so on.
- ☐ **Access:** Remove outgoing committee members' access, especially anywhere private or sensitive info is stored, and check the incoming execs can get into everything they need.
- ☐ **Calendars:** Share upcoming events, meetings, and deadlines.
- ☐ **Regular references:** Pass on whatever the role uses on day to day, like the Clubs Handbook, club forms and templates.
- ☐ **Key contacts:** Forward or introduce the incoming committee to:
 - Sponsors, suppliers, venues
 - The OUSA Clubs & Socs team
 - Any other University contacts, partners, or supporters
- ☐ **Constitution:** Share the latest copy and talk them through the key sections.
- ☐ **Asset inventory:** Give an up to date picture of what the club owns and where it lives:
 - What you own, and where it's stored
 - Any Clubs & Socs storage or external spaces (lockers, facilities)
- ☐ **Regular services:** Note anything the club uses routinely – printing, equipment hire, storage, advice, meeting rooms.
- ☐ **Ongoing costs:** List any subscriptions, hosting, or recurring costs, and how and when they're paid.

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FORMAL COMMITTEE HANDOVER

Club Operations – things to talk through ✓

- ☐ **Key regular tasks:** Walk the incoming committee through what the role actually involves day to day — checking the inbox, taking minutes, planning events, promotions, recruiting, financial admin.
- ☐ **The club year:** Give an overview of the cycle of the year, semester by semester, including –
 - Major events, deadlines or club traditions
 - OUSA's re-affiliation process and timing
- ☐ **Subcommittees and volunteers:** Outline what any supporting roles are responsible for.
- ☐ **OUSA systems:** Share guidance on the tools the role uses — grants portal, club list info form, financial reporting tools.
- ☐ **Financial documents:** Explain how your club manages its financial records and templates.
- ☐ **Useful training:** Any workshops or training you found helpful.
- ☐ **Extra activities:** Mention anything like volunteering or fundraising that's part of the role.
- ☐ **Reflections:** Share what worked well this year, what you'd recommend for next time, and any challenges you hit and how you got through them.

Why Handover Matters

It's really important that outgoing committee members don't just "cut and run" after the AGM. Taking the time to do a proper handover means the knowledge, contacts, and processes you've built up don't get lost when you leave.

If you skip it, the new committee can end up repeating mistakes, scrambling for basic info, or even losing access to accounts and resources.. none of which makes the club's job any easier. A good handover sets the incoming team up to succeed, keeps the club running smoothly year on year, and leaves things tidy for whoever's picking up after you.

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OUSA RE-AFFILIATION REQUIREMENTS

Everything you need to have ready so you can put through your request to be re-affiliated

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• **AGM MINUTES**

Hold your AGM by mid-November, giving notice to all members as per your constitution and making the event free and easy for all to attend. Make sure the meeting agenda is also accessible to all members beforehand. The AGM must meet quorum as in your constitution and be sure to document attendees with student IDs. Cover topics as advised in the AGM checklist.

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• **CONSTITUTION**

If your constitution was updated at your AGM, make sure to give us the newest version - with the changes highlighted. Be sure to reference the most recent OUSA constitution template document to make sure yours is aligned. Keep in mind that any major changes may need OUSA Executive ratification.

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• **COMMITTEE & MEMBERSHIP DETAILS**

Have a list of all your incoming executive committee members - as well as contact information for the President, Secretary and Treasurer (also any co-leaders or Vice President as well if you have them!) If your membership details aren't accessible in Sporty - we may ask for a full membership list (names/student ID #s)

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• **UPDATING INFORMATION**

Get your club info for 2027 updated at the same time

- Give Sporty Portal access to incoming exec's
- Fill in "OUSA Website" form with updated info and contacts
- Update Locker Access form if you have one in the Clubs & Soc's building

Got everything ready? Now just complete the
OUSA CLUB RE-AFFILIATION FORM

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GET ORGANISED: NEW EXEC CHECKLIST

This checklist is here to help new OUSA Club Executives get organised for 2027. It's a quick guide to cover the basics planning, funding, O'Week, and keeping members engaged so your club can start strong and run smoothly through the year.

- ☐ • **Planning & Goal Setting**
 - Hold a planning meeting with the new exec team
 - Set the club's main goals and objective for 2027
 - Decide strategies for gaining new members and keeping current ones engaged
- ☐ • **Events & Activities**
 - Draft a rough calendar of events/activities for the year
 - Summarise each event: type, purpose and timing
 - Schedule a welcome event or first social gathering for early Semester 1
- ☐ • **Roles & Responsibilities**
 - Confirm who will handle key areas (social media, promotion, events, finances etc.)
 - Decide if additional committee roles are needed. Write short role description for open positions and recruit/elect in an SGM in early Semester 1 if needed
- ☐ • **Budget & Funding**
 - Draft a budget for the year's activities
 - Note when OUSA Grant Funding opens and think about what to apply for – equipment, events etc.
 - Explore other fundraising options (merch sales, ticketed events, sponsorship)
- ☐ • **Clubs & Soc's Logistics**
 - Update your club's information online (Clubs & Socs Directory, social media links, etc.).
 - Organise or update locker access if your club has one
 - Book regular meeting rooms or activity spaces for the year.
 - Check in with Clubs & Socs staff if you need extra support or resources getting started

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GET ORGANISED: NEW EXEC CHECKLIST

- ☐ • **Communication & Membership**
 - With relevant exec members – run through how the Clubs Portal membership database works
 - When the membership database refreshes in January, send an email to invite past members to re-sign up
 - Plan regular communications to members (emails, social media updates, newsletters)
 - Send a welcome email to all new members after O'Week

- ☐ • **O'Week Preparation**
 - If 2027 OUSA Re-Affiliation has been approved – register for an O'Week Clubs Day stall
 - Create a roster of who can run the stall during the day
 - Design and prepare promotional materials (banner, posters, flyers, merch)
 - Plan an engaging activity or way to attract students at the stall.

- ☐ • **Task Management**
 - Create a shared task list with deadlines
 - Assign responsibilities to executive/committee members
 - Make sure the list is accessible to the whole team

- ☐ • **Ongoing Operations**
 - Keep accurate financial records and receipts.
 - Update membership list promptly to keep things accurate and timely
 - Maintain consistent online engagement throughout the year.
 - Even after each event, be sure to follow up with a recap, pictures and communicate the next one to your members

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O'WEEK CLUBS DAY STALL PREPARATION

Clubs Day is your chance to showcase your club, meet new members, and make a strong first impression. Here are some tips to help your executive prepare and run your stall smoothly:

☐ **• Registration & Logistics**

- Register your club to get a stall through OUSA when the form goes out.
- If approved, make sure your team knows the stall location, site map, and any induction requirements when they are given in the lead-up to the event.
- Keep all signage and promo materials in your club's locker or another easy-access place, and ensure stall helpers know where to find them.

☐ **• Rostering & Setup**

- Make a roster that covers set-up, the full event, and pack-down. Aim to have at least 2 club members on the stall at all times.
- Share the roster with your team in advance and confirm everyone's mobile numbers (you may need to contact them on the day).
- Remind rostered members the week before Clubs Day to double-check they're still attending.

☐ **• Promotion & Signage**

- Create eye-catching signage that shows your club's name and logo clearly (banners, posters, tablecloths, etc.).
- Bring along photos, videos, or displays of past events to show what your club is about.
- Prepare flyers or pamphlets with key info: social media, contact details, and your first event of the year.
- Think of a fun or interactive element (e.g., game, competition, demo) to grab attention.

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O'WEEK CLUBS DAY STALL PREPARATION



• Member Sign-ups

- Have a QR Code or link to the Clubs Portal membership form
- Bring a laptop or tablet to help with taking signups
- If people aren't sure if they want to fully register on the day, you can collect names and emails manually and follow up with an email to include more information on your club and signup link



• Follow-Up

- After Clubs Day, add new members to your membership list straight away.
- Send a welcome email promoting your first event (ideally held in Week 1 or 2).
- Keep up the momentum with regular updates through email and social media.



• What to Pack

- Club banner, posters, tablecloth and other signage or props to make your space inviting
- Flyers/pamphlets with contact info & event details
- A charged laptop/tablet or printed sign-up sheets (plus pens)
- BluTack, tape, scissors, or clips for setting up signage
- Merch, giveaways, or prizes (if you have them)
- Snacks/water for your stall team
- Hand sanitiser and wet wipes (always useful!)

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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:

PRESIDENT 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:

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POSITION:

FULL NAME:

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MOBILE NUMBER:

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INCOMING EXECUTIVE

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