

# New Clerk Handover Check Sheet Template Form

This model document is intended as an example only. Councils will need to consider the content carefully and adapt it to meet their individual circumstances.



Name..... Handed over by.....

Council	Responsibility	Deadline	Completed Handover
Action People to Contact	Responsibility	Deadline	Completed Handover
Unitary/District/County Council – Principal Authority responsible for elections, bins, planning, street names, highways, education, social care (give the elections team – your details and everything else should slot into place)			
Higher Authority Councillor for the area			
County Association (NALC) provides advice and training courses for the Town/Parish/ Community Council			
Society of Local Council Clerks (SLCC) – advice specifically for the Clerk. There is also SLCC Branch Groups, make sure you’re on their circulation list. SLCC Website			
Association of Local Council Clerks (ALCC, Union for Clerks)			
Community First – rural support			
External Auditor			
Contractors			

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Appointment	Responsibility	Deadline	Completed Handover
Check you've received your Contract before or on your first working day, if not it might be you need to draft this and put it to Council.			
You need to check that the Council has agreed your appointment. Use wording like: 'The Council RESOLVED to agree that.'			
Appointment of you as Clerk and RFO and include number of hours per week / month agreed together with salary scale.			
Agree to you being a signatory on the bank account(s) as a Service Administrator with proviso that you will not sign cheques.			
Obtain a copy of the Electoral Roll – keep it in a secure place.			
Keys to buildings/security codes			
Important Documentation	Responsibility	Deadline	Completed Handover
Standing Orders, take on board the contents these are the rules that Council will need to work to.			
Financial Regulations take on board the contents these are the rules that Council will need to work to			
Read the last years minutes to get a feeling for the actions and work emulating from the Councils meetings if you haven't before taking on the role.			
Read Insurance Policy and Risk Assessments in place.			
Asset Register- this will highlight the assets the council owns and hopefully there is a map with it showing where each of them is situated in the Community.			
Make yourself aware of any lease agreements, Trusts and contracts the Council has or is looking at entering into.			

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<b>Financial Administration</b>	<b>Responsibility</b>	<b>Deadline</b>	<b>Completed Handover</b>
Last year's Audit papers which include the Internal Auditors Report and External Auditors Report, make a note of their contact details.			
Accounting Software/ training, passwords, security contact details for help desk.			
Banking arrangements who is the company, contact details, passwords access codes.			
Petty Cash, if held and account spreadsheets.			
Processing Salary arrangements/ HMRC payments processes etc.			
HMRC passwords and code			
Pensions provider passwords and where documentation held.			
Invoicing system for facilities/tenants			
Tendering/ procurement arrangements utilities etc			
Last VAT re-claim actioned			
<b>Personnel</b>	<b>Responsibility</b>	<b>Deadline</b>	<b>Completed Handover</b>
Staffing list contact details/employee files			
Health & Safety Risk Assessments for home or office working			
Appraisal 3-month/6-month review dates			
Holiday Allowance confirmed			
Staff Training List			
Councillor Training List			
Relief cover arrangements			

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Timesheets blank and process they are dealt with.			
Dealing with referred matters by staff			
Fidelity Letter for Insurance Company sought			
Copy of Car Insurance Policy to be filed with the Council if own car used for work purposes			
<b>Training</b>	<b>Who</b>	<b>Frequency</b>	<b>Completed Handover</b>
Manual handling	All staff	3 years	
COSHH (hazardous substances)	Cleaning and maintenance staff	3 years	
Fire warden	All staff	3 years	
Working at height	Cleaning and maintenance staff	Recommend refresh 3 years	
Managing health and safety	Clerk, facilities and maintenance managers	Refresh yearly	
Health and safety induction	All staff	Refresh yearly	
Food safety level 1	Catering staff	3 years	
Food hygiene level 3	Catering managers	3 years	
First aid at work	<u>Minimum</u> 1 person trained for 5 – 50 employees.  A further person for every	3 years	

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	additional 50 employees		
Dealing with crisis issues process in place			
Dealing with public enquiries process in place			
Obtain legal advice is there a specific solicitor			
Liaison with Higher Authority departments process and contact details			
External Meeting Groups and dates of their meetings			
Introduction to Local Council Administration (ILCA)	All staff		
New Clerk Webinar (SLCC)	Clerk		
<b>Password/ files</b>	<b>Responsibility</b>	<b>Deadline</b>	<b>Completed Handover</b>
County Association/National Association Local Councils			
Unitary/District County Council website areas for Town & Parish Councils			
Parish online mapping			
Facebook Account, Twitter Account, or other social media accounts			
<b>Facilities and Service Administration</b>	<b>Responsibility</b>	<b>Deadline</b>	<b>Completed Handover</b>
Festivals dates and project action plans			
Grounds contracts/parks/tree management			
ROSPA inspections/documentation/ person responsible			
Liaison with Contractors			
<b>Allotments</b>	<b>Responsibility</b>	<b>Deadline</b>	<b>Completed Handover</b>
Where are your allotment sites and how many plots do you have? Do you own them or are they leased?			
Have you got a suite of allotment policies covering such issues as plot sizes, waiting list, livestock and sheds for example?			
Do you have a register of members and are annual fees paid to date?			

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How do you deal with unmanaged plots?			
Do you have a budget in place?			
Training is available through NALC			
Do you have a responsibility for managing access paths, roads, fences, gates, hedges, or water on site?			
What facilities (WC) are available for plot holders and do you need to manage cleansing?			
If your site is managed by a local association, find details of committee members and access copies of minutes or AGM. Do you need to have a representative of the Council on the committee?			
<b>Cemetery</b>	<b>Responsibility</b>	<b>Deadline</b>	<b>Completed Handover</b>
List of local <ul style="list-style-type: none"> <li>• funeral directors</li> <li>• Memorial masons</li> <li>• Grave digger</li> </ul>			
Address of local Register office			
Date to review pricing			
Contact for BRAMM (British Register of Memorial Masons) in case of safety concerns around memorials.			
Date next memorial test due (5 years)			
Process explained - green form from Registry office or white form from Coroner must be provided by the funeral director before the burial takes place Green/white form to be returned to the appropriate register office within 96 hours of burial. (Appropriate register office is the office covering the place of death, not necessarily the local register office) All other processes will depend on the system used.			
<b>Community Hall Servicing</b>	<b>Responsibility</b>	<b>Deadline</b>	<b>Completed Handover</b>
Lightning conductor	Yearly		

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Fire shutter	Yearly		
Air conditioner	Yearly		
Microwave	Yearly		
Refrigeration <ul style="list-style-type: none"> <li>• Fridge</li> <li>• Freezer</li> <li>• Bar cooling</li> </ul>	All: Yearly service Defrost minimum twice per year		
Roller shutters	Yearly		
Automatic door	Yearly		
Accessible toilet equipment	Twice per year		
First aid supplies	Yearly (top up as used)		
<b>Buildings– Testing and certificates</b>	<b>Buildings– Testing and certificates</b>		<b>Buildings– Testing and certificates</b>
Gas soundness test	Yearly		
Boiler installation service	Yearly		
Fire extinguisher inspection	Yearly		
Emergency lighting	Yearly		
Passenger lift LG1 checks	Yearly		
Access lifts (chair/platform lifts)	Yearly		
Fan convactor heaters	Yearly		
Intruder alarm inspection	Yearly		
Mixing valve servicing (taps)	Yearly		
Legionella water testing Inspection	6 months		

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Temperature testing	Monthly	
Electrical installation test	5 years	
Portable appliance test (PAT)	As required by risk assessment	
Fire alarm inspection	Minimum yearly Recommend quarterly	

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