



Helpful handover documents

TN131 Training Notes series: Communication

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I've just been writing a handover paper for a voluntary responsibility I am passing on to a successor. A couple of years ago I wrote a major manual for a professional post I was leaving. So let me set down some of what I have learned to help you if you need to write something similar.

When someone moves on from a staff or voluntary role, it is vital that the experience and knowledge of the present post-holder is not lost. Hence the writing of a **'handover paper'** which might be backed up with a range of digital and hard-copy files for the new post-holder to refer to.

I have in mind a wide range of examples, both paid posts such as:

- a Minister moving on from a church;
- a CEO or department head in a mission agency;
- any church or mission employee: Administrator, Families' Minister, etc.;

but also voluntary positions such as:

- a Church Secretary or Treasurer;
- the organiser for a major church event such as a church weekend away;
- the editor of a church or mission publication.

To add to this variety, the person moving on may only be doing so temporarily, as with maternity leave or a sabbatical, or it might be long-term sick leave.

Seven principles to follow

1 **Provide information more than opinion**

What you write should be strong on factual information. You may also want to add some visuals to your document such as deadline diagrams, screen shots for using software or your photographs of equipment. But try to avoid personal opinion.

For example, if you have organised speaker events, provide names, contact details, dates, titles. You can summarise what the assessment sheets said about them, but avoid adding in your own views about the quality of their delivery. Someone else might have had a different impression.

2 **Avoid too much 'how to'**

This point applies to more senior posts. The aim of the handover document should be to clarify what the role is all about, what it is aiming to achieve, perhaps to explain how it has been done to date, but not to instruct too tightly on how it should be done in future. The new post-holder may find better ways of achieving the same ends.

So a mission department head may run their area of work in quite a hierarchical way, whereas their successor may be much more used to a team approach and want to get their results through a different style of working.

But if this is only a temporary hand-over then it may be wiser to follow the current systems so the permanent post-holder can pick things up once they return. The same will apply to some basic roles where someone coming in will be looking for detailed 'how to' advice. You can always explain how it is done today but say there may well be better ways of doing it.

3 **Take care over what you pass on**

You need to work out what can be passed over and what should remain confidential to you alone. Some files of pastoral opinions and personal correspondence may need to be destroyed. Aspects of your own ministry (such as talks given) clearly remain yours. But public domain data that can inform your successor become part of the handover file.

In everything in the lists that follow in these notes, be sure to follow best practice in data protection, GDPR, safeguarding, etc.

4 **Refer to other files**

List and explain other documents which form a resource library to be passed over, but ensure they are tidied up and so easily understood by someone coming fresh to them. These might include digital files of publications, meeting minutes and papers, sets of accounts, or lists of actions taken. They might be selected email folders, or hard copy publications and file sets of important outputs. For paid posts there will be the staff handbook.

Handing over is an opportunity to tidy the digital and hard copy files, to ensure everything will make sense to a newcomer, to get rid of materials that are not important and no longer needed, but to pass on the key documents that provide the story of this church/mission and this post.

5 **Write it now**

Most people try to write their handover document just before they leave. It is more sensible to write it now – even if you hope to stay in post for some years to come – and then update it year by year. This means there is time to think it through carefully, and no last minute panic when your mind may be on pastures new. It also means that if you have to be away unexpectedly (such as through sickness) the paper is ready. If you are off temporarily (such as for maternity leave) others can cover for you.

6 **Arrange a handover meeting**

It makes a difference if you and your successor can work through the document together so you can explain everything rather than just leaving it as print. Even better if the two of you can overlap in post for a short time so that your successor gets used to running things while you are still around to advise.

But if there will be a gap before your successor is appointed (such as for a Church Minister), sections of your handover document may first need to be shared with those who are taking over aspects of your work as a temporary measure.

7 **Remain available**

It is helpful if you can make yourself available for a few weeks by phone or email to clarify questions that your successor may have. This is not always possible as, for example, someone dismissed from a post may not be open to supporting their successor.

Seven areas to cover

You will probably not need all these sections but they provide a checklist for content. Different types of post will need different balances over this list. You may want to structure your handover document by following these points in order or use them in turn for each element of a major responsibility. You may decide to put some information in appendices.

1 **The big picture**

Before jumping in with detail, it is helpful to set out the big-picture aspects of this role: its history, purpose, the long-term vision for what might be achieved, the value system you work within. Next, list who you are responsible to and how that relationship works out. Also who reports to you and how that works.

Now list a small number of broad responsibilities for this post. Voluntary posts may have a single responsibility ('You are the webmaster for the church's website'), whereas paid posts may have a short list.

2 **Annual schedule/deadline lists**

Most posts or responsibilities have an annual cycle. For a Treasurer this may involve budget-setting, preparation of year-end accounts, independent inspection or audit, and quarterly management accounts. So the handover manual might include a month by month action list. Each of these may need a short explanation of what is involved.

A special event organiser may need something that has headings:

- 18 months before the event
- 12 months beforehand...

... down to:

- 10 days beforehand
- 3-5 days before.

You might even provide a schedule for organising a single element of any post such as a committee meeting where initial discussions, notice, agenda distribution, minutes may all be timetabled. Or major projects that occur from time to time.

3 **Monthly/weekly tasks**

This is the same thing but on a shorter timescale. So a news-sheet editor might have a schedule like this:

Monday+	Start collecting items and contact those due to send in
Wednesday	Prepare first draft and check with Minister
Thursday	Final copy and visuals ready
Friday	Print and fold, distribute e-version.

4 **Current and major projects**

It is unlikely that you will move on at a really neat point with no loose ends. You are almost certain to have current correspondence on the go, contracts not yet signed, issues under discussion, and so on. It is important that all these are listed and explained in a separate section so that there can be as near a seamless handover as possible. It can also be helpful to list deadlines coming up in the next month here even if part of the annual schedule section too.

5 **Processes, systems and passwords**

It may be necessary to explain standard systems, procedures (and policies) in some detail although with the understanding that these might be changed by your successor (see principle No. 2 above). For example, a membership secretary might give a step-by-step list of how each registration is handled at present so that anyone could register a new member correctly in the present system.

This section would also include key IT information such as log-ins and passwords (which should not be listed in a file on your computer for obvious reasons).

It may also be helpful to include some information about specialist software that the new post-holder may not have come across before or the way you use social media for promotion.

6 **Resources lists**

The idea here is to include contact details of anyone your successor may need to get in touch with. It might be a 'Where to go for help if...' section.

If you have undertaken research, it would be a shame if your successor did not have this made available to them. So a Minister might list speakers available on certain themes; the Maintenance Manager could list different boiler contracts he or she investigated with costs, and the Office Administrator might include work done to find a church management system and why other options were not followed up.

Be careful to stick to facts rather than opinions here, but it can be helpful to warn your successor about common frustrations: suppliers who are often late with deliveries,

equipment that is unreliable, rooms that are damp, etc. If you have simple solutions to common malfunctions, share your knowledge here.

Finally in this section, a glossary of acronyms or jargon terms in use can be helpful to someone who is not used to your organisational culture.

7 **Locations and people lists**

An important section will list all the digital and hard copy files being passed over with a brief idea of content (make sure they have all been sorted and tidied). In an office it may be necessary to explain where certain equipment or stationery supplies are kept. A Youth Worker may need to explain the DVD index. You may want to write this as a 'Where can I find...?' section.

Provide also a listing of relevant groups and committees showing frequency of meetings, contact details, etc.

What you hand over

Try to think what your successor would like to know and ensure you provide that information.

So what you are going to hand over will probably be a paper or manual explaining the post or ministry, based on the above and supported by:

- a set of digital folders with key resource information;
- perhaps a set of email folders;
- a set of papers that present a record of activity;
- file sets of items, some of which you inherited when you took over;
- references to other documents which are easily available.

Beware handing over too much. Examples to avoid include detailed correspondence about an event, unsorted digital files that have grown into quite a mess, boxes of items you have not bothered to sort out, and detailed 'how to' instructions which may be redundant.

Beware handing over too little. Lack of contact details, few explanations of what has happened, little detail of what the post entails in practice day-to-day or month-to-month, will all hamper your successor.

A good handover document will inform and equip the one who follows you. They will have a resource to refer back to which will help them avoid panics and missed deadlines. It should give them a great starting point for their new area of service.

These notes are available at <https://www.john-truscott.co.uk/Resources/Training-Notes-index> then TN131. See also Articles A6, *Job descriptions*, and A43, *Every member on active service*, plus Training Notes TN95, *Exit interviews for everyone*.

John's resources are marked for filing categories of Leadership, Management, Structures, Planning, Communication and Administration. File TN131 under Communication (with a link to Administration).

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