**Change of Clerk Handover**

When there is a change of clerk it can be daunting to think of the number of things which must be handed over in a timely manner. In an ideal world, the outgoing clerk will have some overlap with the new clerk, but this rarely happens because many clerks are only required to work a month’s notice. If a council is fortunate, it will enjoy a good working relationship with its outgoing clerk and may be able to arrange some form of handover to the new clerk.

As a minimum, and using a councillor as an intermediary if necessary, the outgoing clerk needs to handover the council’s property including signed minutes, computer, peripherals, paper documents, the copy of Charles Arnold Baker, keys, and leftover office consumables. The outgoing clerk should also handover all passwords, e.g. Windows passwords, web site and e-mail passwords and any security codes etc.

In terms of business continuity it is useful if the new clerk is given a list of agreed dates for parish council meetings, contact details for parish and unitary councillors, supplier contact details and copies of any extant contracts.

Computer filing systems tend to be specific to each clerk. It takes a new clerk time to find their way around the system and in due course they may wish to rearrange things. It is really helpful if the outgoing clerk can list which directories hold policies, procedures, letters (sent and received), planning comments, planning register, allotment agreements and financial information (accounts, budgets, VAT).

It would also be incredibly useful for the new clerk to have a timetable of tasks to be completed (monthly, quarterly, annually) so they are aware of when the bank reconciliations/planning register updates/budget review/request for insurance quotes etc. are due.

Change of address can be the most time consuming (and annoying) task every new clerk faces (if they work from home). In some cases it will take a couple of months to update addresses, so try to have an agreement with the outgoing clerk in place to decide who is responsible for the mail going to the old address. Will the outgoing clerk drop it over to the new clerk/chair, or will the new clerk collect mail when advised? The new clerk will need to advise the change of address to dozens of different people, but it is useful if the outgoing clerk can leave a list of those already informed and those yet to inform. Completion of the [Amend Clerk Details | My Website (northantscalc.com)](https://www.northantscalc.com/amend-clerk-details) on the Northants CALC website will update the clerk’s details. If you have a 2Commune website you will need to send an email to [admin@2commune.com](mailto:admin@2commune.com) to amend the details on your website.

This article is nowhere near an exhaustive list. It simply highlights the point that the handover between clerks needs some careful thought and planning. Otherwise it will consume more time than it needs to, and things will fall through the gaps.

The real key is to remember that handovers take time and patience and there will inevitably be some things that take much longer than expected. For example, a task such as “Set up laptop in new clerk’s house” is something that could take 5 minutes or 5 hours! And if the new clerk is only contracted for 10 hours per week those hours could disappear quite quickly!

**Practical Handover Checklist**

|  |  |  |  |
| --- | --- | --- | --- |
| Action | Existing clerk | New clerk | Handover complete |
| Passwords – password list prepared |  |  |  |
| Signed, hard copies of the minutes/minute book |  |  |  |
| Copy of Charles Arnold Baker/any other books |  |  |  |
| Asset register reviewed and handed over |  |  |  |
| Keys – all keys identified and labelled |  |  |  |
| Laptop/printer/scanner handed over |  |  |  |
| External hard drive/USB handed over |  |  |  |
| Document shredder handed over |  |  |  |
| Guillotine/laminator/staple gun/filing cabinet handed over |  |  |  |
| Large maps handed over |  |  |  |
| Tender documents handed over |  |  |  |
| List of village group contacts (useful for Annual Parish Meeting invitations) |  |  |  |
| List of bank signatories |  |  |  |
| Bank mandate changed |  |  |  |
| Councillor training record |  |  |  |
| NCALC new clerks form completed and sent to NCALC |  |  |  |
| Contact details changed for: |  |  |  |
| Northants CALC |  |  |  |
| Unitary Council |  |  |  |
| HMRC |  |  |  |
| Bank |  |  |  |
| Pension provider/Pensions Regulator |  |  |  |
| External Auditor |  |  |  |
| ICO |  |  |  |
| Utility company |  |  |  |
| Telephone/broadband/mobile phone |  |  |  |
| Insurance |  |  |  |
| Website |  |  |  |
| Domain providers |  |  |  |
| SLCC |  |  |  |
| Northants ACRE |  |  |  |
| Clerks and Councils Direct |  |  |  |
| CPRE |  |  |  |
| Neighbourhood Watch |  |  |  |
| Undertakers (if burial authority) |  |  |  |
| Mowing contractors |  |  |  |
| Dog bin emptying contractors |  |  |  |
| Tree surgeons |  |  |  |
| Pest removal company |  |  |  |
| Stationery suppliers |  |  |  |
| RoSPA play area inspectors |  |  |  |
| Venue owners |  |  |  |
| Defibrillator provider |  |  |  |
| List of council meeting dates and contract renewal dates |  |  |  |
| Calendar of clerk duties (e.g. planning register review, internal control review, budget review etc) |  |  |  |
| Overview of computer filing system |  |  |  |

July 2023