

Executive Handover Procedure

Approval Date:	June 2026	Approval Authority:	LUSA Executive
Review Date:	June 2028	Contact Officer:	LUSA President

Purpose

1. The purpose of this document is to outline the steps of Handover to ensure that there are efficient and meaningful transitions between LUSA Executive (hereafter, the Executive).
2. This document aims that relevant information on Executive responsibilities, duties, and the code of conduct is passed on to all prospective Executive Members. This document also aims that project progress information is not lost during Executive Handover.

Handover Responsibilities

1. Upon appointment/election and prior to attendance at their first Executive meeting, newly appointed Executive Members will receive a copy of the Executive Handbook and any other relevant legal governance documentation, current and recent meeting papers, the current year's meeting schedule and the Governance work plan. They will also be given an opportunity to seek feedback from the current Executive on their campaigns and ideas for moving forward.
2. Newly elected or appointed Executive Members will meet with the President for a governance familiarisation. This meeting may be held as a group session or with individuals. They will also attend at least one Executive meeting to learn protocols.
3. Newly elected or appointed Executive Members will also meet with the General Manager for an operational familiarisation.
4. It is expected an incoming Executive will receive at least one day's training covering all of the above at the commencement of their term. Each exiting Executive Member must update and prepare the living handover document relevant to their role, for the Executive Member entering their position. This must outline the expectations of the role and help the incoming Executive Member get a better understanding of what occurred in the previous year.
5. This document will then be stored in perpetuity on the President's hard drive.
6. The exiting Executive Member must reference and uphold the Executive Charter during the handover.

Handover Procedure

1. Each exiting Executive Member must make contact and hold a meeting with the candidate elect who will be entering their position. During this meeting, each exiting Executive Member must share and explain the living handover document that outlines all responsibilities associated with their role to the Executive Member entering their position.
2. The handover document must contain an overview of the role and information about any relevant ongoing initiatives, contacts, and committees. It must also contain any relevant resources, such as official documentation templates.

3. The handover document must also contain notes on progress achieved within the term of the exiting executive member.
4. The incoming Executive Member must endeavor to understand all responsibilities outlined in the handover document.
5. If incoming Executive Members are unsure about responsibilities associated with their position, they may ask previous Executive Members or LUSA staff for advice.
6. In the case that an Executive Member is re-elected to the same position in the year directly following their initial term, they must prepare summary notes of their progress, contribution to committees and ongoing initiatives during the term that is ending. This document must be treated in the same manner as other handover documents; however, in this scenario a meeting with the candidate-elect is obsolete.
7. All incoming Executive Members must attend executive training, irrespective of whether they have previously held LUSA Executive positions.

Review

1. This procedure shall be reviewed biennially.
2. The LUSA Executive may change the procedure in the interim.

Associated Documents

1. [Executive Charter](#)
2. [Code of Conduct Policy](#)