**Playgroup Handover Checklist**

**Are you an incorporated group? Please use the** [**Incorporated Playgroup Checklist**](https://www.playgroupwa.com.au/wp-content/uploads/2017/11/Incorporated-Playgroup-Handover-Checklist-v2025.pdf)

|  |  |  |  |
| --- | --- | --- | --- |
|  Item/Task/Description | Person Responsible | Information required (Logins/AGM dates/links contact etc.) | Completed |
| Yes | No | N/A |
| Financial Information |  |  |  |  |  |
| Bank account information |  |  |  |  |  |
| Bank account change of signatories’ form |  |  |  |  |  |
| Bank statements for last 7 years and/or log-on information to access |  |  |  |  |  |
| Grant information including past applications |  |  |  |  |  |
| Financial information for current year – budget/fees/expenditure commitments/issues |  |  |  |  |  |
| If your group has an ABN – name and login details for ATO (through My Gov) needs to be changed if person leaving |  |  |  |  |  |
| Committee Information |  |  |  |  |  |
| Committee contacts from outgoing committee |  |  |  |  |  |
| Incoming committee names and contacts |  |  |  |  |  |
| Committee roles and responsibilities |  |  |  |  |  |
| Agendas and Minutes of meetings |  |  |  |  |  |
| Social media and email account log-in/passwords |  |  |  |  |  |
| Gmail login if using online forms and documents  |  |  |  |  |  |
| Policies and Procedures |  |  |  |  |  |
| Health and Safety/Risk Assessment  |  |  |  |  |  |
| Behaviour Policy/Conflict Policy/Social Media Policy  |  |  |  |  |  |
| Playgroup rules charter  |  |  |  |  |  |
| Insurance Information |  |  |  |  |  |
| Insurance documents/information |  |  |  |  |  |
| Attendance records (need to keep for 20 years) |  |  |  |  |  |
| Accident and Injury form and records/information/book |  |  |  |  |  |
| Certificate of Currency |  |  |  |  |  |
| Inventory of toys and equipment (required for insurance) |  |  |  |  |  |
| PGWA Membership Information |  |  |  |  |  |
| Membership records including enrolment forms |  |  |  |  |  |
| Membership system instructions |  |  |  |  |  |
| Change committee positions in the membership system |  |  |  |  |  |
| Venue Information |  |  |  |  |  |
| Rent/Hire documents and information including costs and contacts |  |  |  |  |  |
| Information about venue responsibilities e.g. maintenance, utilities |  |  |  |  |  |
| Key arrangements |  |  |  |  |  |
| SpacetoCo login if used for bookings  |  |  |  |  |  |
| Venue/Facilities contact  |  |  |  |  |  |
| Playgroup WA  |  |  |  |  |  |
| PGWA Development Officer information and contact |  | See link below |  |  |  |
| PGWA office contact information |  | hotline@playgroupwa.com.au |  |  |  |
| Information about support that is available from PGWA |  |  |  |  |  |
| PGWA website and Resource Kit – templates/guides etc  |  | <https://resourcekit.playgroupwa.com.au/>  |  |  |  |
| Subscribe/Join PGWA social media including Committee Facebook Group - <https://www.facebook.com/PlaygroupWA/> <https://www.facebook.com/groups/pgwacommittee>  |  |   |  |  |  |
| Other Information |  |  |  |  |  |
| Activity ideas and information |  |  |  |  |  |
| Incursions and Excursion ideas |  |  |  |  |  |
| Community Development Officer contact in Local Government  |  |  |  |  |  |
| Promotion information/Links to Canva/Fliers/Images etc  |  |  |  |  |  |
| Local business contacts/Grants information  |  |  |  |  |  |
| For Information and support please contact your [Playgroup Development Officer](https://www.playgroupwa.com.au/wp-content/uploads/2017/11/Playgroup-WA-Development-Officer-Support-Areas-1.pdf) or email hotline@playgroupwa.com.au |