

Membership secretary handover checklist

Work through every line with the incoming and outgoing officer together. Tick, date, and keep a copy with the club records.

Free template from SportsHQ (www.sportshq.app). Adapt freely; check your own constitution and governing body rules where flagged.

The record

- ☐ Membership system or spreadsheet access with full rights
- ☐ Current member list verified against payments
- ☐ Category definitions and current fee for each
- ☐ Consent and data records, and where they live

The process

- ☐ How someone joins, step by step, as it actually happens
- ☐ The renewal cycle with dates and templates used
- ☐ How lapses are decided and recorded

The exceptions

- ☐ Members on special arrangements, with the reason and who agreed it
- ☐ Honorary and life members and what their status means
- ☐ Any live membership disputes

The connections

- ☐ What the treasurer receives and when
- ☐ What coaches and safety officers pull from the record
- ☐ Governing body registration requirements per member

Sign-off

Outgoing officer, name and date: _____

Incoming officer, name and date: _____