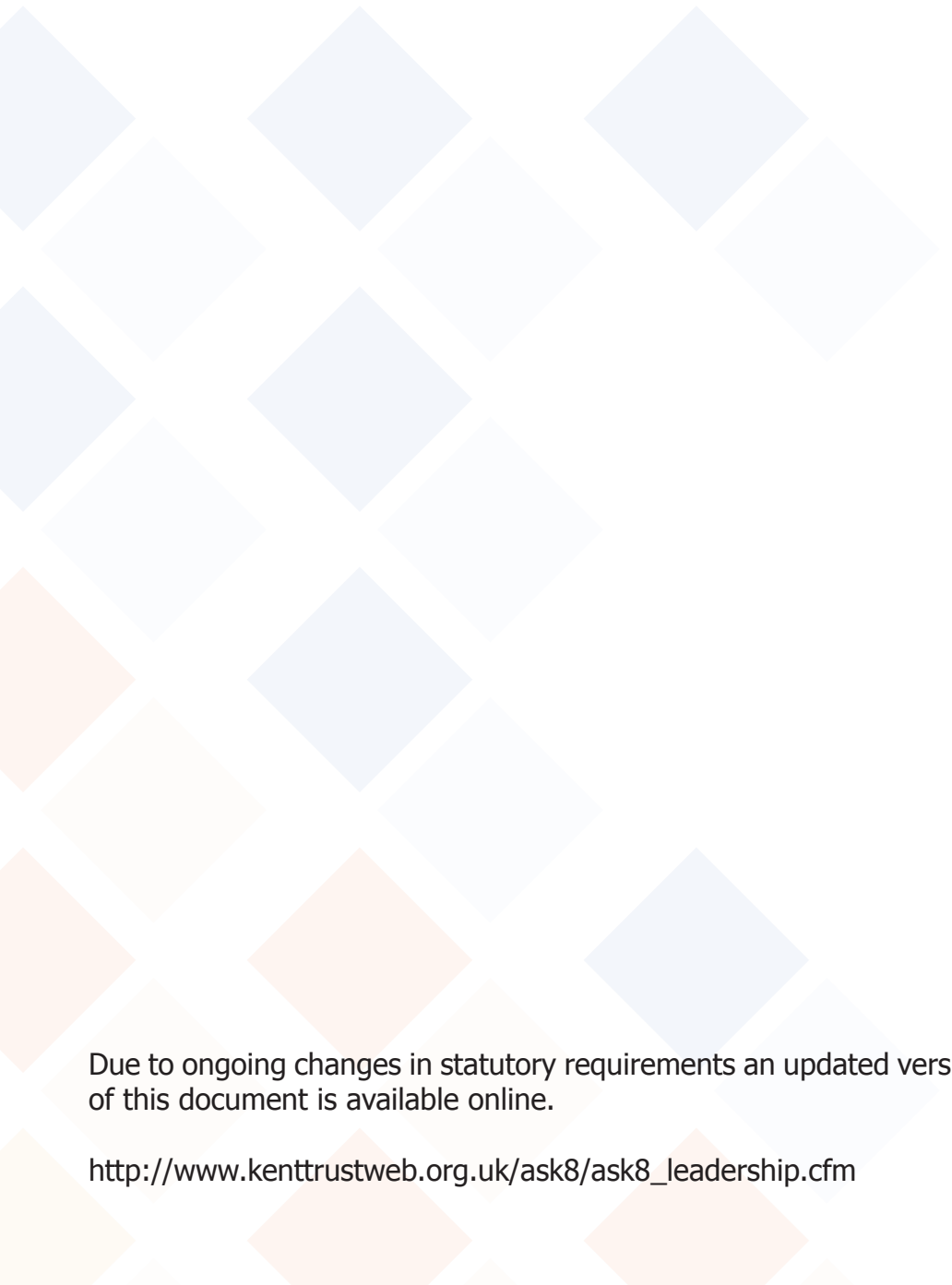


**ASK**  
Advisory Service Kent



Children,  
Families &  
Education

**Primary Headteacher  
Handover Checklist  
March 2009**



Due to ongoing changes in statutory requirements an updated version of this document is available online.

[http://www.kenttrustweb.org.uk/ask8/ask8\\_leadership.cfm](http://www.kenttrustweb.org.uk/ask8/ask8_leadership.cfm)

## Primary Headteacher Handover Checklist

It is advisable that, when a headteacher leaves a school, there should be a formal verification and handover of all the key information and financial assets and accounts of the school. This booklet is designed to facilitate a handover procedure. Both the incoming and outgoing headteacher have the opportunity to ensure that all interested parties are happy that all essential information is in good order at the point of handover for the benefit of the pupils in their care.

### Recommended Procedures

1. The outgoing headteacher needs to ensure that all elements of the booklet are completed with the support of school based staff. This document then needs to be discussed with the incoming headteacher during a meeting at a mutually convenient time before the end of term or notice.
2. The incoming headteacher needs to ensure that all items are checked and verified and where necessary appropriate action taken. The location of documents, data and keys also needs to be clarified at this meeting.
3. Should the incoming headteacher not be known, or is not available, then the outgoing headteacher should arrange to complete the handover procedure with an officer/governor/deputy headteacher, who is remaining at the school and who has been assigned the task by the governing body.
4. It needs to be noted that it is the outgoing headteacher's responsibility to discharge his or her financial responsibilities before leaving the school.
5. A copy of this booklet needs to be retained in the school.
6. A completed copy needs also to be shown to the Chair of Governors.

**Signed .....** **Outgoing Headteacher/Officer**

**Signed .....** **Incoming Headteacher/Officer**

**Signed .....** **Chair of Governors**

## School Information Sheet

**School:** \_\_\_\_\_

**School DCSF Number:** \_\_\_\_\_

**School URN:** \_\_\_\_\_

**Acting Headteacher/s:** \_\_\_\_\_

**Senior Management Team:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Secretary/  
Business Manager:** \_\_\_\_\_

**Chair of Governors:** \_\_\_\_\_

**Deputy/Vice Chair:** \_\_\_\_\_

**Clerk to Governors:** \_\_\_\_\_

**Caretaker:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

**Area Children's Services Officer:** \_\_\_\_\_

**Tel:** Office: \_\_\_\_\_ Mobile: \_\_\_\_\_

**Local Children's Services Partnership Manager:** \_\_\_\_\_

**Tel:** Office: \_\_\_\_\_ Mobile: \_\_\_\_\_

**School Improvement Partner:** \_\_\_\_\_

**Tel:** Office: \_\_\_\_\_ Mobile: \_\_\_\_\_

**PEP Headteacher:** \_\_\_\_\_

**Children's Trust Chair:** \_\_\_\_\_

**Nominated Emergency  
School Contacts:** \_\_\_\_\_

**Partnership Triad Headteacher Contact:** \_\_\_\_\_

## Strategic School Documents

<b>Documents</b>	<b>Person Responsible</b>	<b>Date of Revision</b>	<b>Where located File or folder name</b>
Vision/Mission Statement/Aims & Objectives			
School Development Plan			
SEF (and access code)  Parent Survey  Pupil Survey			
Ofsted Report and Ofsted Action Plan (if applicable)			
Church Inspection Report (If appropriate)			
School Prospectus			
School Profile			
List of School's initiatives with LA and who is responsible i.e. RAYS Programme Intensive Support Prog. Ensuring Success Quest Learning Network			
Staff Responsibilities/Job Descriptions/Contracts of Employment/Performance Management targets			
School 3 year Budget Plan Monthly Monitoring Returns Projected Developments 3 year salary plan Leasing Agreements Date of last compliance visit			
FMSiS passed or application date Best value statement Statement of Internal Control			
Minutes of staff and Senior Leadership Teams meetings			
Names and addresses of all staff and governors			

Governor Meeting Minutes with Headteacher's Report to Governing Body			
Governor Training Package service level agreement			
Personnel service level agreement			
Provider of Professional Services Contracts (Finance)			
Voluntary Fund Name of auditor and date of last audit			
CRB register			
Health and Safety Risk Assessment			
PTA Constitution (if appropriate)			
Log Book (if appropriate)			

## Curriculum Standards

<b>Documents</b>	<b>Person responsible</b>	<b>Date of Revision</b>	<b>Where located</b>
Raiseonline Access Code  www.raiseonline.org			
Results - Foundation KS1 SATs Optional SATS (if appropriate) KS2 SATs CAT tests (if appropriate)			
Pupils Progress Tracking i.e. Assessment Manager Target Tracker			
Foundation Profile  E Profile & Data			
Pupil Files / Statements / IEPs / Provision Mapping  Annual Review Timetable			
Notes of Visits and any LA reports			
KS2 Transition arrangements			

## School Policies and Procedures

<b>Documents</b>	<b>Person responsible</b>	<b>Date of revision</b>	<b>Where located</b>
Accessibility Plan			
Administering Drugs & Medication Policy			
Admission Policy			
Attendance Policy			
Assessment/Recording/Reporting Policy			
Behaviour & Discipline Policy			
Charging Policy			
Child Protection Procedure and File Designated Child Protection Person			
Collective Worship Policy			
Curriculum Complaints Procedure			
Curriculum Statement			
Disability Access Policy			
Drugs Policy			
Early Years Policy			
Emergency Closure Procedures			
Equal Opportunities Policy			
Finance Policy			
General Complaints Procedure			
Health & Safety Policy			
Racial Incident Policy			
Teachers' Pay Policy			



## Codes for Access

<b>Documents</b>	<b>Person responsible</b>	<b>Where located</b>	<b>Username</b>	<b>Password</b>
Bank Accounts  PTA Funds				
Door Codes Fire Alarm code (if required)				
Established passwords for access to internal information				
Established passwords for external information				
On- Line Access Codes  SEF  Assessment Codes  School Profile  Kent Teach Code  SIMS  Kent Trust Web username and password				

## Handover Statement of Financial Accounts and Assets on a Change of Headteacher/Responsible Officer

**NB: ALL FIGURES IDENTIFIED SHOULD BE THOSE AT THE DATE OF HANDOVER**

		AMOUNT £	COMMENTS
<b>SCHOOL BANK ACCOUNTS (Reconciliation Report completed and attached)</b>			
1	Bank balance from FMS6/accounts package (Income & Expenditure Report attached)		
2	Petty Cash held in school		
3	Bank balances from physical bank statement(s) (copies attached) a) Current Account b) Deposit Account c) Other Account/s		
4	Unpresented Cheques		
5	Unpresented Income		
6	Reconciliation Report balances at the date of handover	YES/NO*	
7	Bank notified of change of signatories or if Nat West corporate scheme forms sent to Statutory Finance	YES/NO*	
8	Purchase cards reviewed and cancelled/reissued (if applicable)	YES/NO*	
<b>STATUTORY RETURNS</b>			
9	Approved 3 Year Plan original year-end forecast surplus/deficit		
10	Current year end surplus/deficit forecast from most recent monitoring report		
11	Loan Balance (if applicable)		
<b>SCHOOL VOLUNTARY FUND</b>			
12	Reconciled Bank Balance		
13	Petty Cash Balance		
14	Outstanding income		

15	Outstanding expenditure		
16	Bank notified of changes to signatories	YES/NO*	

**If other accounts have been set up please use a separate sheet for details of these accounts**

**SECURITY OF EQUIPMENT AND ASSETS**

17	Asset Register checked and agreed	YES/NO*	
18	All keys (including safe keys accounted for and handed over)	YES/NO*	
19	Password to computer systems changed as necessary	YES/NO*	

**DINNER MONEY (where appropriate)**

20	Agreed amount of receipts awaiting deposit		
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**ANY OTHER INCOME**

21	Agreed amount of other receipts awaiting deposit		
----	--	--	--

Any other financial issues the outgoing Headteacher/Responsible Officer should make the incoming Headteacher/Responsible Officer aware of:

.....

.....

.....

\*Delete as appropriate

## Staff Information

Staff and Teaching Assistants Pay Points

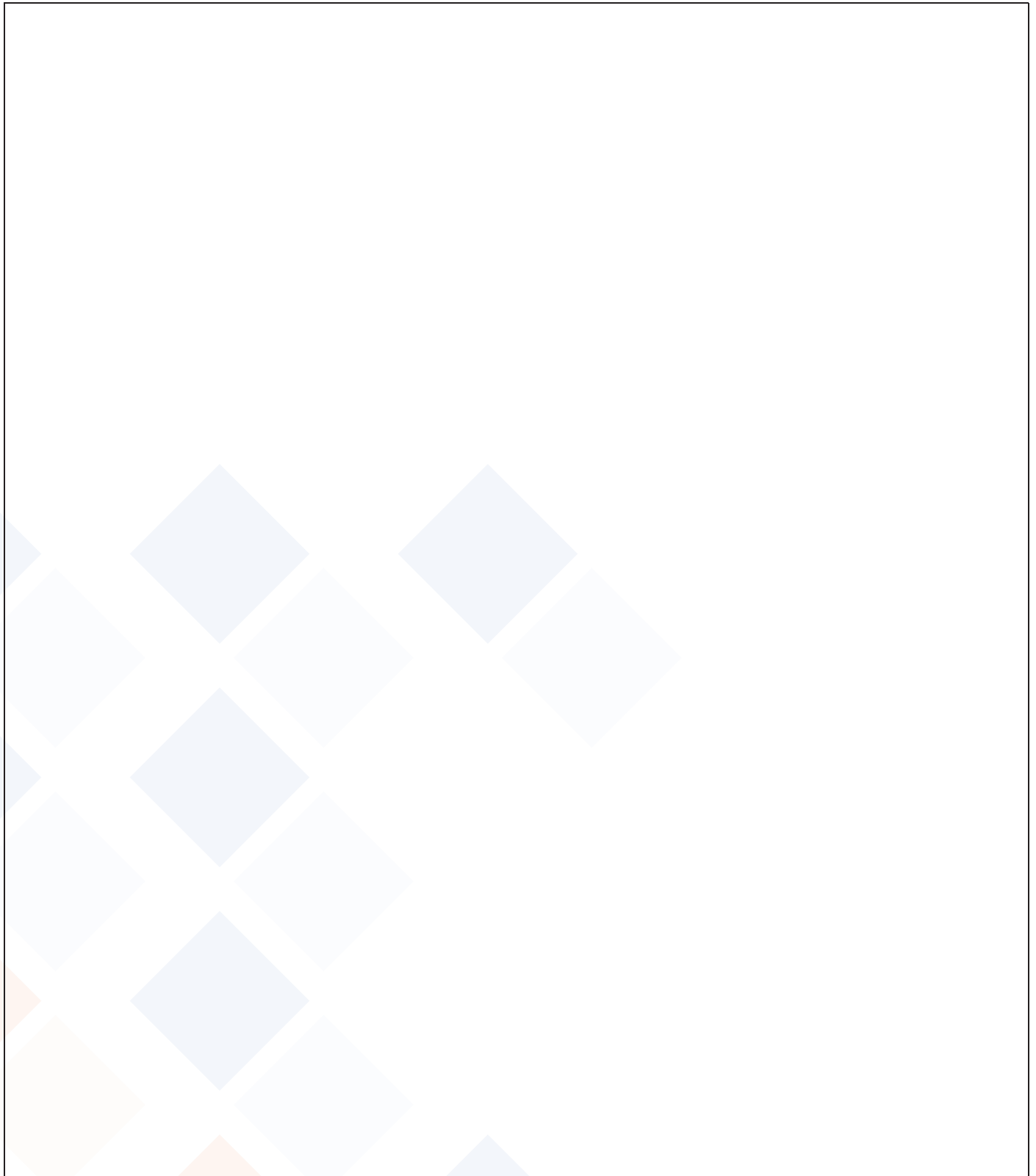
Teaching Assistant Hours and Days

Catering Contract

## Kent County Council Documents

<b>Key Documents and Information</b>	<a href="http://www.kenttrustweb.org.uk">www.kenttrustweb.org.uk</a>
Health & Safety Framework	Health & Safety Manager Tel: 01622 694476
Child Protection Procedures Manual	Head of Children's Safeguards Service Tel: 01622 696366
Cluster Plans	<a href="http://www.kenttrustweb.org.uk/Clusters/cluster_contacts.cfm">http://www.kenttrustweb.org.uk/Clusters/ cluster_contacts.cfm</a>
Statutory Budget Manual	Statutory Team Tel: 01622 772200
Services for Schools	Kent Services for Schools Tel: 01622 694908
Management Information	Principal Management Information Office Tel: 01622 694541
Improving Together Network	Oxford Road 01622 203800
Admissions Procedures	Manager for Admissions and Transport Tel: 01622 696565
PESE Guidance	Manager for Secondary Admissions Tel: 01622 696565
Early Years	Principal Early Years and Childcare Adviser Tel: 01622 696166
School Governance	Head of School Governance Tel: 01622 01622 605118
Gifted and Talented	Oxford Road 01622 203800

## Notes

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**Primary Headteacher Handover Checklist**

