



Unless you want to be responsible for supporting your fundraising group forever, it is a good idea to create a handover pack.

Fundraising group handover packs

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Every group is different, some are just a loose affiliation of people others are legally constituted entities so your pack should reflect the needs of your group.

Here are some things that you might want to include in the pack (remember to comply with the [data protection](#) act when storing people's personal information):

- Contact details of members past and present (with a note of people who do not want to be contacted again in future)
- As much information about each individual's preferences as you feel able and appropriate to keep on your contact database
- A copy of any legal documents relating to the group: accounts; constitution; memorandum and articles; insurance etc
- Copies of minutes of previous meetings (it is assumed that they will contain a record of previous fundraising activities, what went well, what not so well and why)
- Contact details of individuals and organisations that have been supportive of your group and a brief description of how and when
- Contact details of service providers (if you have them): accountant; commercial secretary etc
- Information about any recruitment campaigns that have been run in the past
- New member [induction pack](#)
- Group rules or other formal agreements
- Annual plan
- Information about use of the group's name and logo and a record of any permissions that the group may have to use the logo and materials of the organisation it supports
- Copies of photos from previous events and any media publicity for use in future promotional materials and reports
- Copies of receipts and any other ongoing purchase or ordering information

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