

SDH Design Team End of Year Handover Checklist

The purpose of this document is to prompt incoming student leaders to look at required handover items from the previous lead. To help streamline this process, a handover discussion can be planned with the Engineer in Residence and the previous lead (if they are available). Here are some things you should ensure you have access to when taking over team leadership:

- List of team members from previous year with personal contact details to help coordinate kick off for new year with remaining members
 - Minimum: Personal email, phone, and social media of previous year's team lead
- Team Bank Account Transferred
 - Appointment scheduled with bank (must have all signing authorities present to transfer ownership)
 - Ensure that all out of pocket expenses are reimbursed where possible before starting new year
- Commitments to previous year's sponsors closed out (ensuring all obligations are met helps ensure that you will get repeat support)
- Document management system handed over
 - Ensure you have admin privileges for the storage
 - Ensure that all deliverables and any other useful files are uploaded and organized so they can be found easily (getting files right after people graduate is much easier than a year later)
- Debrief discussion scheduled, the purpose is to understand all work partially completed and to capture any lessons learned from the previous year's competition
- Specialized knowledge captured (highlight any specialized knowledge that the team had to develop to be successful and set up a lunch and learn to ensure that knowledge is preserved)
 - Lunch and learn scheduled (if relevant)