



HM Treasury

Handover note

Job title
Branch name
Team name
Group name

Date

Your name

Dear [X]

Welcome to the Treasury and the [X] team!

I have tried to set out as much useful information as possible in this note, including:

- Policy areas and possible issues to take forward
- Links to key documents. They are all in SharePoint.
- Key contacts and stakeholders

My biggest tip for this job is to [X]

I hope you find this handover note useful. Please feel free to give me a call on [X] or drop me an email [EMAIL ADDRESS] if you have any questions....

[YOUR NAME]

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SECTION 1: INTRODUCTION TO HM TREASURY, GROUP AND [X] TEAM

HM TREASURY

You may need to book yourself on a Treasury induction course – a course run by [Learning and Development](#). The next one is on [DATE].

You may find the [Treasury organogram](#) useful. It sets out all the groups, teams, Deputy Directors, etc.

The [About us section](#) on the intranet details our ministers, management, priorities, etc.

The Groups dropdown provides more information on each group, with links to their sites and other key documents and links.

GROUP (GROUP ACRONYM)

There is information about [GROUP] on the intranet.

There is a group organogram [INSERT LINK] plus sections on [DETAIL AND LINK TO OTHER CONTENT OF INTEREST].

The Treasury's corporate repository is Info Store. Please take a look at [Getting started with Info Store](#) that you know how to use it.

There are inductions for [LINK TO DETAILS] - the next one is on the [DATE].

The [GROUP NAME] senior management team (team leaders, deputy directors and director generals) meet every [DAY] at [TIME].

TEAM (TEAM ACCRONYM)

The Deputy Director is [NAME] and is in the office on [X]. Their details are here [LINK TO MY SITES ENTRY].

Business support is provided by a team called Group Management Support or GMS. [LINK TO GMS DETAILS].

Our SharePoint site [INSERT LINK TO TEAM SHAREPOINT SITE] will give you more details and includes a team organogram: [LINK TO TEAM ORGANAGRAM]

Responsibilities within the team are as follows:

[BRANCH NAME 1]

[BRANCH LEAD NAMES]

[ROLE OF BRANCH]

[BRANCH NAME 2]

[BRANCH LEAD NAMES]

[ROLE OF BRANCH]

[BRANCH NAME 3]

[BRANCH LEAD NAMES]

[ROLE OF BRANCH]

Filing

Our files can be found in Info Store. [DETAILS OF DOCUMENT LIBRARIES – NAMES, LOCATIONS, WHAT SHOULD BE FILED WHERE, ETC.]

Team meetings

These are every [DAY]. Team meetings usually cover [X]

Line Management

You have formal line management responsibilities for [X].

Appraisals

Appraisal rounds run from April to April with mid-year reviews undertaken around November. Guidance is issued annually on the process. [Performance management and appraisals](#).

Cost centre

The team's cost centre is [XXXXX]

SECTION 2: JOB DESCRIPTION

As head of/member of [INSERT BRANCH NAME], your work will be varied and issues and priorities will and do change over time.

In broad terms the team is responsible for:

- [LIST OF RESPONSIBILITIES]

Our objectives are [LINK TO SHAREPOINT PAGE ON TEAM OBJECTIVES] .

Working with the other branches, you are responsible for ensuring the potential for [NAME OF POLICY AREA] to support the Government's wider economic, social and environmental objectives is fully explored in joined up policy-making across the Treasury.

Key responsibilities for the branch include:

- [LIST OF RESPONSIBILITIES]

A wide range of issues will cross your desk in any one week – these can range from: [INSERT TYPICAL TYPES OF ISSUE]

Key questions I would always ask are:

- [LIST OF KEY QUESTIONS]

HMRC

- [LIST OF HMRC CONTACTS]

A lot of HMRC contacts are on Treasury's address list (prefixed with "zzHMRC_"). Otherwise the standard email format for those who have external email is firstname.lastname@hmrc.gsi.gov.uk

Other Government departments

- [LIST OF CONTACTS]

Meetings with Ministers

You will sit in on meetings with Ministers on the majority of [POLICY AREA] policy issues that fall within the branch – these are most often around [KEY EVENTS, i.e. BUDGET] time.

A little planning ahead of a meeting goes a long way:

- [LIST OF MEETING TIPS]

Routine tasks and meetings:

- [LIST]

Lessons I learned while doing this job:

- [LIST]

SECTION 3: STAKEHOLDERS

Note to leaver: Please ensure you inform key stakeholders that you are leaving your post, and if possible, arrange to meet them with your successor before you move on.

- [LIST AND DESCRIPTION OF KEY EXTERNAL STAKEHOLDERS]
- [BACKGROUND INFORMATION]
 - [BRIEFS ON KEY STAKEHOLDERS]
 - [LINKS TO DETAILS OF KEY MEETINGS FILED IN INFO STORE]
 - [LINKS TO MOST RECENT MEETINGS FILED IN INFO STORE]
 - [ANY OTHER RELEVANT INFORMATION]
- Arrange early meetings with the following stakeholders: [LIST]

SECTION 4: POLICY AREAS

Policy issues

- [RELEVANT HISTORICAL POLICY ISSUE]
 - [BRIEF DESCRIPTION]
 - [CONTACTS INCLUDING HMRC, STAKEHOLDERS AND PRIVATE OFFICES]
 - [DEADLINES]
 - [LINK TO RELEVANT DOCUMENTS]
 - [EXTERNAL DATA SOURCES, INCLUDING KAI CONTACTS]
 - [ALERTS AND BRIEFINGS TO KEEP UP TO DATE]
-
- [LIVE POLICY ISSUE]
 - [BRIEF DESCRIPTION]
 - [CONTACTS INCLUDING HMRC, STAKEHOLDERS AND PRIVATE OFFICE]
 - [DEADLINES]
 - [LINK TO RELEVANT DOCUMENTS]
 - [EXTERNAL DATA SOURCES, INCLUDING KAI CONTACTS]
 - [ALERTS AND BRIEFINGS TO KEEP UP TO DATE]

Parliamentary questions

- [LIST OF OUTSTANDING PQS]

Updating Paymaster General

- [ITEMS TO FLAG TO PMG]
- [LINK TO INFO STORE DOCUMENTS]

Key Budget issues

- [CONTACTS]
- [WORKSTREAMS]
- [INFO STORE LINKS]

The Budget and Finance Bill database is used to track Budget measures. Induction courses are available from the [Learning Management System](#).

Key measures for this Budget cycle to watch are:

- [LIST OF MEASURES]

Other issues

- [MISCELLANEOUS ISSUES]

Keeping current

Key cases that you will want to track are:

- [LIST OF CASES]

You can keep up to date with this via [WEBSITE LINK/EMAIL ALERT]

SECTION 5: KNOWLEDGE MANAGEMENT

Key information sources are:

- [NAMES OF JOURNALS]
- [EMAIL UPDATES]
- [DATA SOURCES]
- [WEBSITES]
- [PEOPLE TO SEE OR CONTACT REGULARLY – internal and external]
- [KEY DOCUMENTS TO READ]

Other useful sources of information include:

- [Parliament](#) (to check PQs in Hansard, and Committee proceedings)
- [Wired gov](#) (a free newswire service that will enable you to keep up to date with major publications and press releases across relevant government departments)
- [Useful links](#) to key Treasury partners, Public sector organisations, etc.
- [LIST FURTHER SOURCES]

Routine tasks and meetings:

- [LIST]

Lessons I learned while doing this job:

- [LIST]

I hope you enjoy working with the team – good luck!

[YOUR NAME]