Handover Plan   
[Name of departing team member]

[Date]

|  |
| --- |
| **Name of Departing Team Member:**  **Position:**  **Manager’s Name & Position:**  **Date of Departure:** |

## Introduction

When you are leaving your position/organisation, you will likely be required to work with your manager to help with the handover period to your successor. Being organised and proactive will help to ensure a smooth transition and enable you to leave with an excellent professional reputation.

This document will step you through key aspects of your handover and help to ensure all the key information that may be required for someone to pick up your responsibilities is captured.

Some tips:

* Start by having a detailed discussion with your manager to determine exactly how you will both handle the handover. Once you have a clear idea of your manager’s expectations, work through and complete the sections in this document that apply. This will help you to organise yourself, and catalogue all the various tasks and pieces of information that you’ll need to pass on.
* Tie up loose ends. If you know you will be leaving your post soon, it can be helpful to put in a little extra work to make sure you tie up loose ends. You will get a sense of satisfaction at achieving this, and you will also be helping your manager/successor to reset or start off with a clean slate. Doing this will also help ensure that you leave on excellent terms and with a good reputation. This won’t always be possible, but if you have something that is nearly over the line, put in a little extra work to get it done.
* Communicate with your colleagues. Before your successor is due to start, try to make some time to talk to your colleagues about the handover and ask if there is anything they think you should highlight. If there is a developing issue that you are unaware of, this is a good opportunity to find out.
* Allow as much time as possible. Obviously this will depend on the circumstances, but the more time you have available for a handover, the more information you will be able to pass on.
* If possible, arrange for your successor (or whoever is picking up your responsibilities) to shadow you – this is a good way to expose them to the variety of day-to-day activity in your position. Also highlight available support and training opportunities for them.
* Consider providing your contact details to your successor. Not everybody will be comfortable doing this, but you might like to offer for them to contact you if they need to follow up on something. Often a problem can be resolved with a simple email.

## Process & timing for communication of departure

**Things to consider:**

* Key messages for different audiences – team members; customers/students; other key stakeholders/contacts both internal and external. May include eg:
  + Details of departure - leaving date, reasons, where they’re going
  + Acknowledgement of their achievements/successes
  + Acknowledgement of any impact on the team/workload
  + Handover and any succession or interim arrangements
  + Details of any farewell activities/events
* Medium of communication – eg. email / telephone call / intranet post / announcement at event
* Who the communication should come from and how
* Whether a farewell event is appropriate and what this might involve

*Use the table below to document the key points agreed:*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Audience** | **Key messages** | **Communication Activity** | **Who** | **When** | **Date completed** |
| Team members |  |  |  |  |  |
| Customers/students |  |  |  |  |  |
| [other] |  |  |  |  |  |
| [other] |  |  |  |  |  |

## Key stakeholders

**Things to consider:**

* Think about who you are required to interact/partner with in order to effectively perform your role
* Consider both internal and external stakeholders, and individuals as well as groups

*Use the table below to capture details of key stakeholders:*

|  |  |  |
| --- | --- | --- |
| **Stakeholder Name, Role/Organisation** | **Why do you engage/partner with this stakeholder?** | **Contact Details** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Key documents / files / reference material

**Things to consider:**

* Think about the key documents that you use or need to access/update regularly as part of your job. Ensure they are up-to-date and appropriately named, and that they are saved in a location that is accessible to your manager/to others as appropriate.
* OneDrive Accounts - These should be cleared and any Unitec related documentation should be downloaded to the relevant H Drive team folders.  Personal stuff should be downloaded to personal devices.
* If a document or file has several versions make it clear which is the most recent and remove or archive old versions.
* Ensure any emails that need to be kept for business/legal/records management reasons are saved to a shared location that is accessible to your manager/to others as appropriate. Emails can be stored in email folders that are shared with your manager.

*Use the table below to list all key documents/reference material that you need to access/use relatively regularly in order to perform your role effectively:*

|  |  |  |
| --- | --- | --- |
| **Document name** | **What is document used for?** | **Document location**  **(H Drive/OneDrive/Sharepoint/Shared email)** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Work-Related Online Accounts

**Things to consider:**

* Think about any online accounts or applications that you are required to access in the course of your role.
* Don’t include any passwords associated with your personal name/email address – instead, if a personal account is required, then provide information on how/where to set one up.

*Use the table below to list all generic logins for work related online accounts/applications:*

|  |  |  |
| --- | --- | --- |
| **What is the login used for?** | **URL** | **Username & Password, or how to set up an account** |
|  |  |  |
|  |  |  |

## Key Meetings / Forums / Committees

*Use the table below to detail any regular/recurring meetings, forums or committees that you attend as part of your role.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name & purpose of meeting or forum / who chairs it** | **Frequency &  day/time/venue** | **Role you play & any actions/issues outstanding** | **Links/locations of minutes and/or other related information** |
|  |  |  |  |
|  |  |  |  |

## Key Tasks / Reports

*Use the following table to list any regular/recurring tasks or reports that you are required to complete as part of your role.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name & purpose of task/report** | **Frequency & when due to whom** | **Role you play and any actions/issues outstanding; other key people involved if relevant/useful** | **Links/locations of related reports & information** |
|  |  |  |  |
|  |  |  |  |

## Current Projects & Events

*Use the following table to list any current or “in-play” projects and/or events that you are involved in as part of your role.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of project/event** | **Status** | **Role you play and any actions/issues outstanding; other key people involved if relevant/useful** | **Links/locations of project documentation / minutes etc.** |
|  |  |  |  |
|  |  |  |  |

## Anything else that may be important or useful:

*Make a note below of anything else that might be important or useful for someone picking up your role either permanently or temporarily:*

|  |
| --- |
| * [Notes] * [Notes] * [Notes] |

## Contact information after departure *(optional)*

If you wish please provide us with your contact information after departure:

|  |
| --- |
| **Phone:**  **Email:** |