Handover Procedures

Overview
This purpose of this document is to outline the actions expected by an outgoing employee to facilitate the smooth transitions between outgoing and incoming members of staff. The procedures provide the staff member’s successor with key knowledge and information regarding the position so that the transition period is as short and smooth as possible.

The handover notes are prepared by staff members who are about to leave their positions, either temporarily or permanently, to assist their successor to carry out their duties, understand their role and follow-up on any outstanding actions.

Actions include:
- Handover Notes (outline of role, matters for attention ...etc.)
- Document/Contact Listing (files, phone numbers, passwords ...etc.)
- Resource Delivery (keys, access cards, tools, laptops ...etc.)

Applications
- Any staff member who is about to leave his/her position permanently is required to write a Handover Note. They shall be written even when a staff member is leaving his/her position to assume new duties within the same mission or office.
- In the case of a temporary absence, particularly if the absence is longer than four weeks, it is strongly suggested that the staff member shall agree with the supervisor on whether a Handover Note should be written and if so how detailed it needs to be.
- A staff member who was temporarily covering the functions due to a colleague’s absence, may write an email which will serve as Handover Notes, to ensure a smooth transition back.
- Handover notes shall be finalized during the week before the staff member leaves his/her position. Ideally, there should be a period of overlap with the staff member’s successor of no less than five (5) working days.

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• If this is not possible, the staff member should send the handover notes to his/her successor copied to their Supervisor/Manager before departing, and supplement the note with phone conversations or by e-mail.
• If a successor has not yet been appointed, the staff member should leave a handover note with his/her supervisor/manager.
• When staff members assume duties at new positions, they should request a Handover Note from their manager if one was not received already.
• Handover Notes should be no longer than 1-2 pages, excluding supporting attachments. They should be factual and practical, rather than analytical.
• The attached template should be used. Sections of the template that do not apply to the staff members may be ignored.
Handover Notes

Name of Current Incumbent: .................................................................
Job Title: ............................................................................................

Date of Handover Note:.................................................................

Incumbent’s Status:  Permanent [ ]  Contract [ ]  Temporary [ ]  Acting [ ]

Brief Description of Duties: (This section should reflect main functions and actions of the role in line with the Job Description, but specific to core actions.)

• …………………
• …………………

Supervisor/reporting procedures: (This section should outline all reporting relationships/obligations.)

• …………………
• …………………

Regular/re-occurring meetings, committees, reports or procedures:

• ………………………
• ………………………

Key Documents/reference material to read (attach when possible):

• …………………
• …………………

Status of recent and current projects/reports/meetings:
1. Name of project/report/meeting:
   ………………………………………………………………………………….   Priority: Y[ ]  N [ ]
   ○ Status
   ○ Action needed
   ○ Partners

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- Budget (if applicable)
- Critical issues/challenges/priorities

*(Repeat as many times as necessary. Indicate priority projects.)*

**Where to find files (hardcopy and electronic):** *(Note: IT to grant access to needed folders as requested by the Manager)*

- ............
- ............

**Calendar of major activities and/or events (optional):**

- ..........................................................
- ..........................................................
- ..........................................................
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**Contacts (internal and external):**

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<th>Name</th>
<th>Organization</th>
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**Your contact information after departure:**

- Phone: ...........................................
- E-mail: ...........................................
- Fax: .............................................

**Suggested attachments:**

- TOR/Job description, Policy document or Meeting notes
- Key persons or documents relevant for the position
Signature: .................................................................

Date: ...............................