

## Handover checklist

This checklist has been written from the perspective of a team member handing over to their successor. It can easily be re-written from the perspective of the new team member.

### Before they arrive

- Update or write the job description for your post
- Find out as much as possible about your replacement
- Make sure team members, partners and others are aware of your replacement's imminent arrival
- Settle your accounts/expenses etc
- Clean out old files on the computer and organise current files into folders
- Copy current files onto memory stick or similar if you are not leaving the computer for your replacement
- Clean out old paper files and organise current papers and documents
- Prepare list of important contacts including name, position, organisation, phone number / radio call sign /email address, notes about past and future collaboration / conflicts.
- Prepare brief handover note.

### When they arrive

#### Introduction

- Work through the job description
- Explain the line management structure and key working relationships
- Begin introducing them to the team
- Spend time giving them the history and context of the project so far

#### Handover

- New person shadows you in your job
- Use this time to instruct and answer questions.
- Start teaching any new skills that will be needed
- Introduce them to more of the key people in a methodical way and make it clear to everyone when they will be assuming responsibility.
- Draw up and discuss a list of the current issues and those for the coming 3 months

#### Exit

- You take a back seat
- It's clear to everyone that the responsibility has shifted to the new person
- Ensure that your replacement receives the authority and respect needed for the job
- Continue to support and offer advice when asked
- Ensure all the resources needed to fulfil the job are in place
- Leave