

## Policy

Date of last change: 2019-11-30

Date approved by SP Board: 2019-12-03

Effective Date: 2019-12-03

Settlers Park is committed to a smooth handover of responsibilities when employees are reassigned or leave the organization, for whatever reason. In general, a new person should take over the work of the person who is leaving, and the person who is leaving should, where possible, provide training and support (but not do the work) during the handover period.

## Procedure

Before an employee or service provider moves on, Management should designate a person to take over the responsibilities of the person who is leaving. This may be a new employee, an existing employee, a short-term contractor, or a member of the Settlers Park Board.

The following tasks and responsibilities should be handed over as soon as possible:

1. Confidentiality documents must be signed and filed.
2. Relevant staff should be advised of the change in reporting structure.
3. Telephone lists should be updated and placed online, if necessary. Printed telephone lists need not be distributed until the normal scheduled time.
4. Any email address known to Residents or the public should be transferred:
  - a. Where the address is related to the position (e.g. info, accounts, jobcards, gm, pa-gm, etc.), the new person should take control of the account and change the password.
  - b. Where the address relates to a person's name (e.g. bianca, judy, johan) then a rule should be created which forwards any email to a suitable positional address and responds to the sender of the email advising them that they should contact the positional email address in future.
5. Equivalent banking facilities should be created for the new person and the existing facilities of the outgoing incumbent should be cancelled.
6. The existing filing system should be explained and demonstrated to the satisfaction of the new person.
7. Calendar appointments should be transferred.
8. The directory structure of any Park computers under control of the outgoing person should be reviewed and explained.
9. All work in progress should be explained and handed over.
10. The new person should be registered on all computer systems with the same authorities as the outgoing incumbent. The registration of the outgoing incumbent on the system should be cancelled.
11. All keys to Park facilities should be handed over.
12. Both the old and new incumbent should attend any meetings.

All work that the outgoing incumbent used to do should be done by the new person, and the role of the outgoing incumbent will be to train and support.