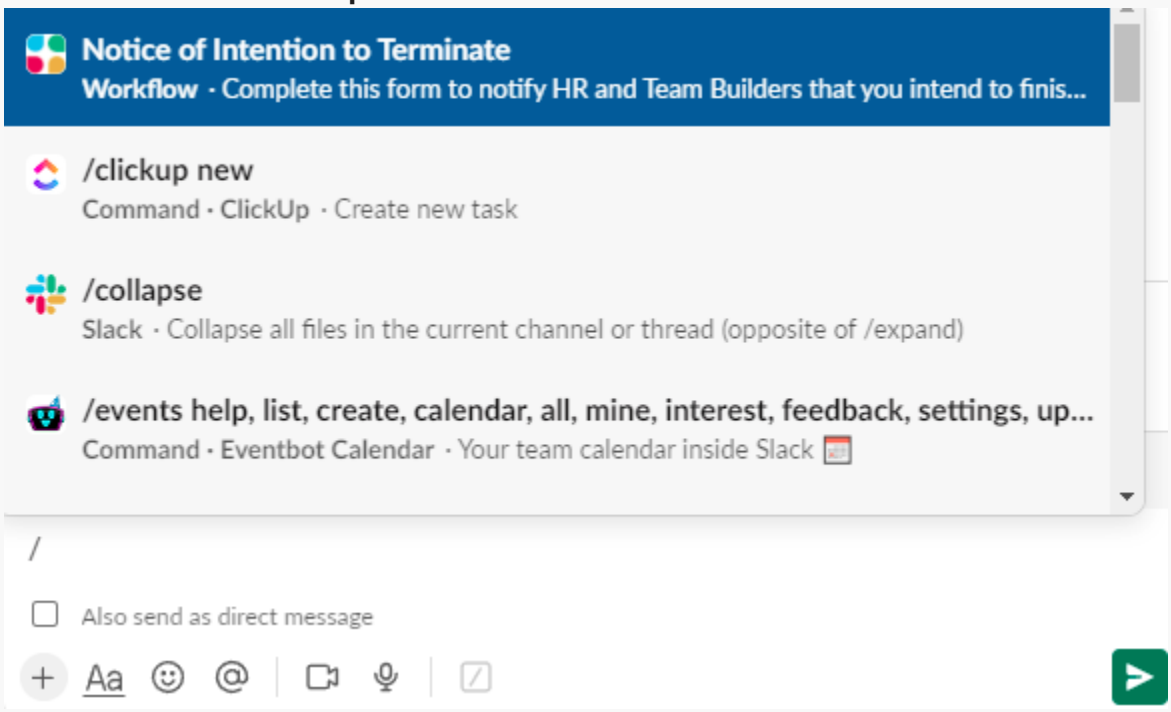
Leave/Resignation and Handover Checklist

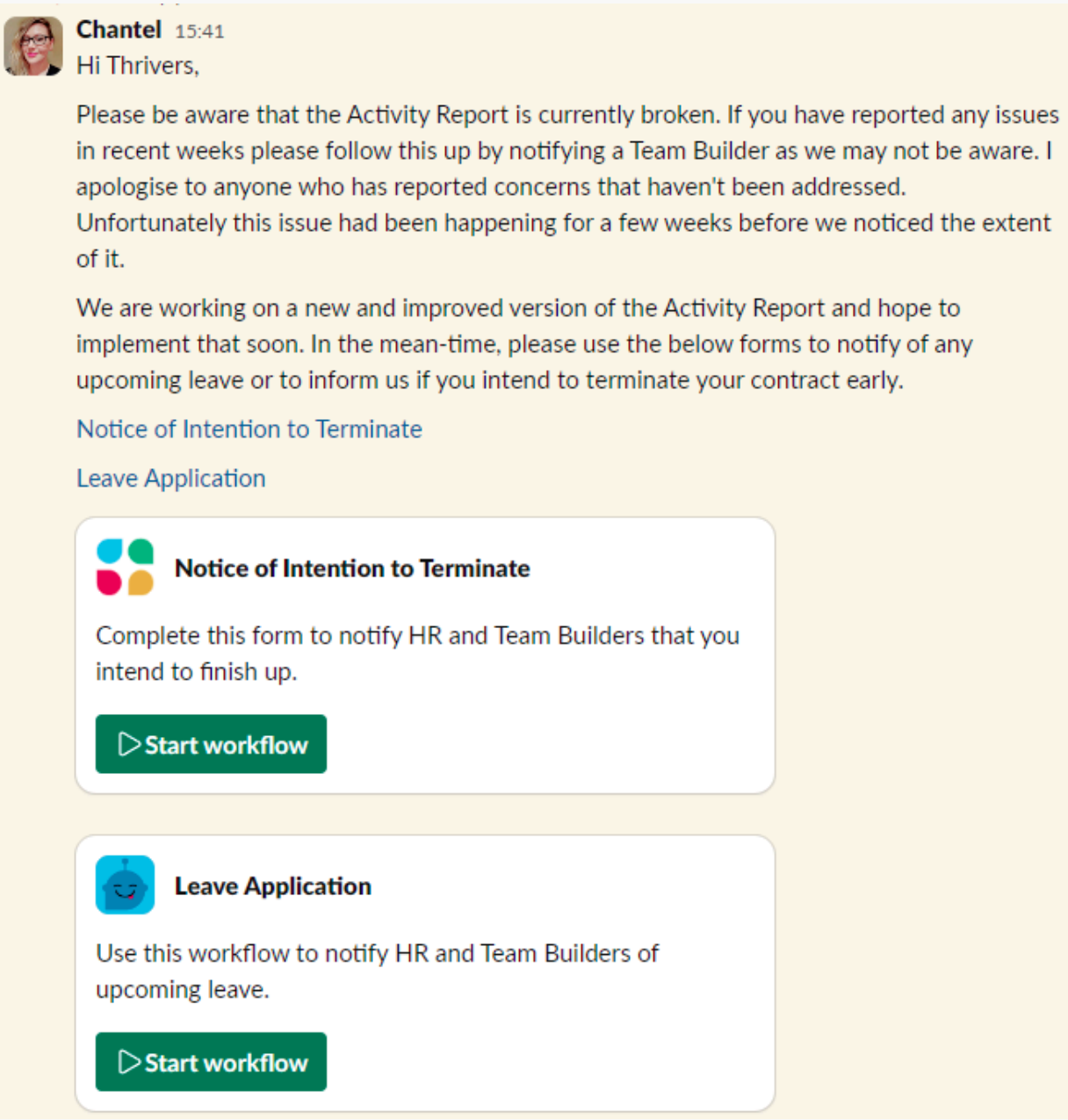
Note: This checklist is a guide for the handover process to be completed before taking leave or resigning. The handover process should occur over the course of a month minimum, but can be accelerated.

☐ **Submit your leave/resignation notice through Slack form.**

- Leaves:
  - Submit your leave request at least **2 weeks** before the start date of your leaves that are **14 days or less**.
  - For leave **more than 14 days**, email hr@strive2thrive.earth the details of your leave at least **30 days in advance**.
  - For sick leave and emergencies, please email hr@strive2thrive.earth ASAP.
- Resignations:
  - Submit your resignation at least **1 month** before the date of your resignation..
  - Put the same leave start and end dates in the AR.
  - THRIVE has deployed a '**Notice of Intention to Terminate**' function in Slack and it's in the testing phase. To do so **forward slash / in the message box and type 'resign' to select the 'Notice of Intention to Terminate' option.**



- You can also find pinned instructions in the #general channel



- If your name doesn't appear in the AR, contact a teambuilder for guidance and follow the steps below..

☐ **Contact a teambuilder (TB) or team assistant (TA).**

- A teambuilder may approach you first.
- If you don't know who are TBs, ask who to contact regarding leave and resignation handover in #assistants channel.
- A teambuilder will confirm the details you filled out in your leave/resignation notice: <u>leave request date, leave start date, leave end date and duration of leave.</u>

- [ ] **Provide the following details of your handover to the teambuilder.**

- [ ] List of tasks to be handed over.
    - Including tasks to be completed before or after leave (tasks that don't require handover).
    - If no handover is required, then the TB/TA may provide further guidance or directly approve if leave is 14 days or less.

- [ ] Identify who is the new thriver(s) taking on the tasks for the duration of the leave (or permanently in case of resignation).
    - If you don't have a replacement in mind, ask your team member(s) if they're able to take over.
    - You can ask TB/TAs to help you if you're struggling to find people to take over your tasks.

- [ ] Create a training plan (for a month minimum) for the new thriver(s) (if they haven't done the task before) to ensure their competency.
    - The training plan doesn't have to be extensive and only requires basic details of what tasks the thriver will learn how to do, what knowledge they need to learn and by when (a projected date).
    - If you are **resigning**, the training plan should be more thorough.

- [ ] Grant resources and access to new thriver(s).
    - Endorsing access requests in #it-support.
    - Ensuring they know where to find resources.
    - Relevant documentation and guides is up to date to reflect the latest processes.
    - 'How to' manuals

Example of a handover list for Social Media Lead (SML):

- Editing the Podcast series, Thriveable Life (Not Future that's Justin) --> handed over template/files to @Justin
- Managing the Twitter --> @Steve
- Managing the LinkedIn --> @Steve
- Creating graphics for: Sustainable Tips, International Days (The non-reel days), Monday Quotes, Blog Promotion Thursday --> @Teresa No need to worry about 90% of Jan content. Needs advertising for Feb Webinar. @Lillian creating Social Media graphics document/guide.
- Webinar promotion graphics, particularly Speaker promos --> @Teresa but as a whole is everyone's responsibility in Social Media. @Lillian is making a document/guide right now on making the said Webinar content that she did in the past. There are a lot of templates so it will make things easier.
- Creating calendar for the month in the Social Media Calendar & Content Lab --> created new calendar/content lab that is different approach to old one and avoiding blanket captions. @Samira @Louise @Raquel
- Leading the Social Media meetings --> @Raquel

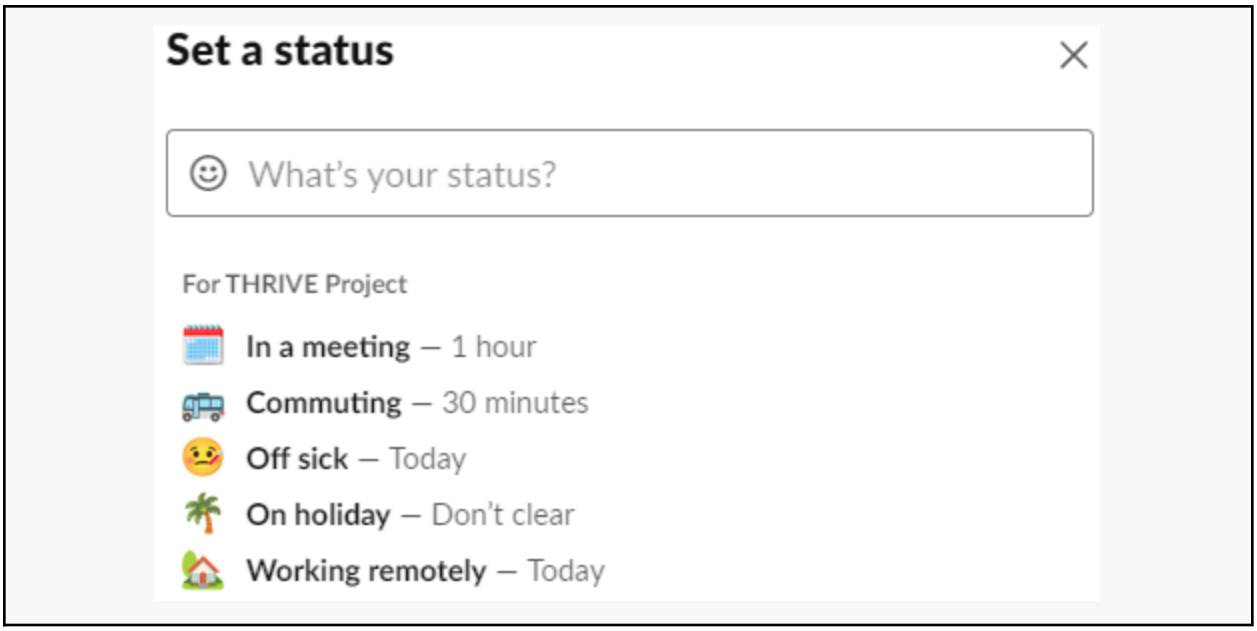
☐ **Keep teambuilder updated of the new thriver's readiness with the tasks.**

- The teambuilder will want to know about the new thriver:
  - ☐ What tasks have they been informed of?
  - ☐ Are they aware of the workload and can they handle it?
  - ☐ What resources do they have access to?
  - ☐ Do any permissions to tools and resources need to be granted?
  - ☐ Do they know how long they'll be handling the task(s)?
  - ☐ When will their training be completed?
  - ☐ Has everything been communicated correctly? For e.g. does the new thriver know the difference between being a team lead versus hosting meetings?

☐ **Complete new thriver's training**

☐ **Inform teambuilder of handover completion.**

- The status of the leave approval can be seen in Slackbot. Alternatively, ask a TB/TA for updates.
- Leave can only be approved if a task handover has been organised.
- Leave for **14 days or less** can be approved by TB/TAs.
- Leave for **more than 14 days** can only be approved by HR.
- When you go on leave or are 'Off sick', please update your Slack status.
  - Click on your profile picture → 🙂 Update your status



Note: 'Notice of Intention to Resign' function within Slack has been deployed.