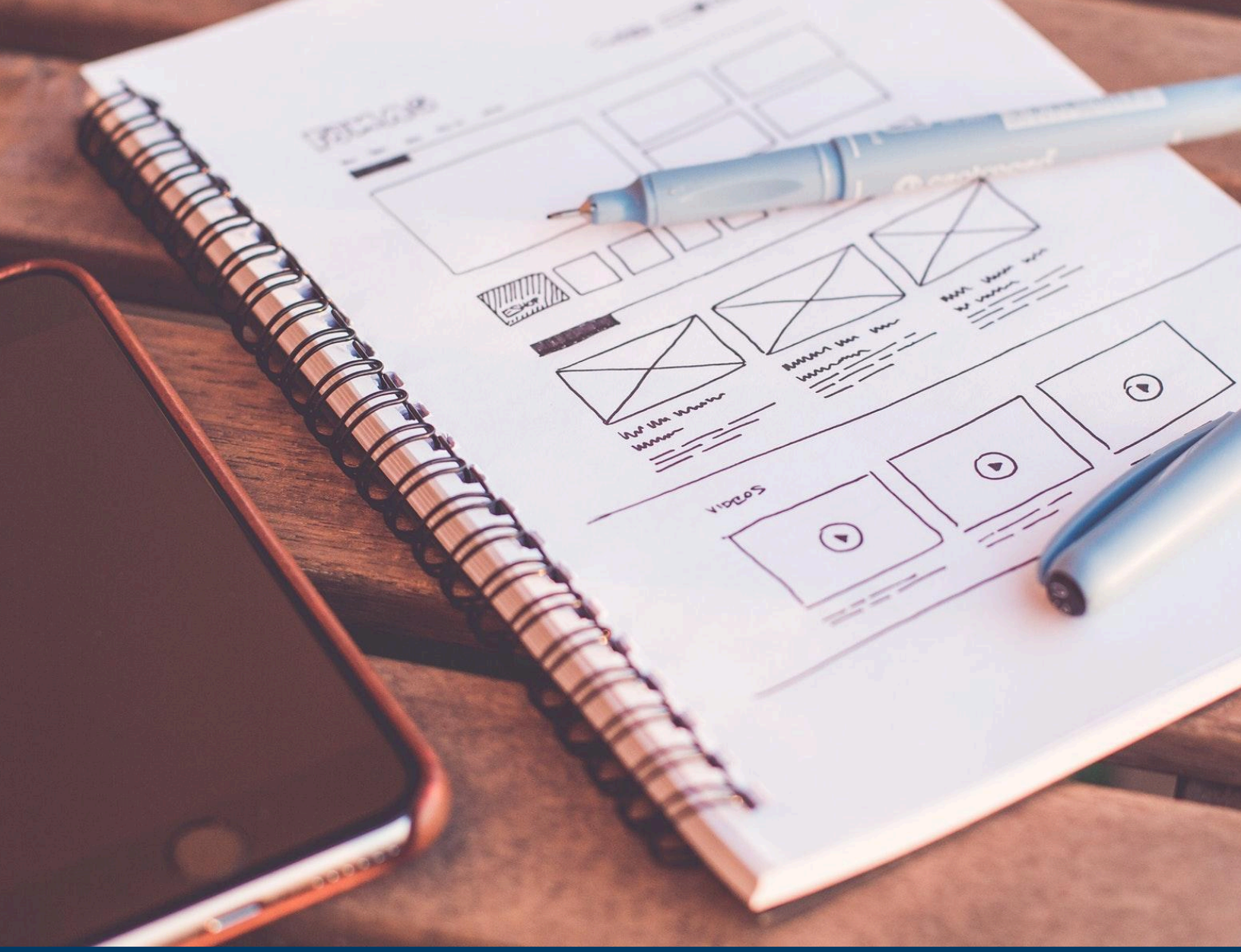


OCTOBER 2025, v4.3

TEAM ASSISTANT/BUILDER GUIDELINES

THRIVE

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Resources

Resources : Team Assistant/Builder Responsibilities
VR- Volunteer Role Posting Calendar: https://docs.google.com/spreadsheets/d/1oMuvgzCdtTvdTki9K20XTT8AMEK2Tz8LP4AAUFmOlc0/edit#gid=1321886168
THRIVE Outreach Checklist: https://docs.google.com/document/d/15YKKgGtgyUkZD1iHeFXXQ2VCChUWLKFGWB_M1UR6i_A/edit?usp=sharing
Newcomer Checklist: https://docs.google.com/spreadsheets/d/1U6ghGgzAlc4GWC4i6J9juyGNZPpHCjlVL07F3VXGia4/edit?usp=sharing
THRIVE Recruitment & Retention Guidelines: https://wiki.strive2thrive.earth/forms/THRIVE%20Recruitment%20&%20Retention%20Guidelines.pdf
Team/Task Support Assignment: https://docs.google.com/document/d/1Rqk8G6HTJvNtEPkfKCdbmYtUQRMf8xntgpmrZ3LoGQ4/edit?usp=sharing
AR Subset: https://docs.google.com/spreadsheets/d/1rwu-1y8wRg-rrwYgI4WTbP7OOL6qrVyLBj0JeRn4dKE/edit#gid=467925285

THRIVE Overview Subset: https://docs.google.com/spreadsheets/d/1YfdcLOuIQluGo3N6Hx-kKvWj8VZKDJ3H0JuImixdoic/edit#gid=587046716
THRIVE Google Calendar: https://calendar.google.com/calendar/embed?src=thrivabilitymatters%40gmail.com&ctz=Australia%2FBrisbane
THRIVE Project's LinkedIn Job Posts: https://www.linkedin.com/company/thrivabilitymatters/jobs/
VR Outlines: https://drive.google.com/drive/folders/1TEXSwpc8FjTR6VCw9ZEkvE8ZhmpiGmVq
How to run a research meeting: https://wiki.strive2thrive.earth/forms/THRIVE%20How%20To%20Run%20A%20Research%20Meeting.pdf
Research Presentation Calendar: https://docs.google.com/spreadsheets/u/1/d/1KgYsEkZ5vAn0Pc5XFu-5TU4-xd9p9MGz7LZlo48Idj8/edit#gid=533150947

Resources : RACI
RACI Presentation: https://docs.google.com/presentation/d/10zKzBc5tpvEXFoWJQnZAJc2RBaTBv02V/edit#slide=id.p1
RACI List: https://docs.google.com/document/d/1cRf_Z7S5HHKOMdxTqDsOVZlmfVCj8J8ex6wBQg1TWMI/edit

Resources : Scheduler and Daily Diaries (DDs)
How To Use THRIVE Event Scheduler and Daily Diaries: https://docs.google.com/document/d/1da1kQWuBbweRlFQl81QK5_CyYXR5qgaWcECXorlY9fA/edit?usp=sharing

Team Assistant and Builder Responsibilities

Team Assistants (TAs) and Team Builders (TBs) collectively provide support for other teams and assist in volunteer staff retention. Retention involves integration, training, and performance.

You may also be involved in tasks outside of the #assistants team or may be directed towards a specific team. There may be TA roles/tasks that are specific to the #research team, for example.

The channels that will be relevant for you will include #assistants, #team-building, and sometimes #recruitment.

Also join several other channels like #social-media, #multimedia, #tf-promotion, #webinar etc. Please confirm with your fellow TAs about which teams are relevant for you.

General tasks

Regularly **check for tasks** in messages in the #team-building and #assistants channels in a timely manner.

You will **receive and respond to queries** in messages from other Thrivers daily. When people ask for help, TAs/TBs point them to the right direction–whether that's to resources or people. A TA/TB may get involved, but they shouldn't get overloaded and prioritising work outside of their role.

It is important that you become familiar with THRIVE's various procedures and documents so that you may relay the correct information to them. Refer to a document coordinator.

Learning about THRIVE's processes is an ongoing task, you will need to **be self-directed in exploring our wiki**, but please also **rely on other TAs/TBs for support** when you are uncertain.

If someone asks a question that you are not familiar with, first try to find it in the wiki. If you cannot find it there, you can ask in the #team-building channel or another TA/TB directly.

You should also check #it-support to answer any queries if you're able to.

Weekly Meetings

Team assistants have weekly meetings at the same time and day each week. Teambuilders may have separate, private meetings if they're discussing confidential matters.

In these meetings, we discuss any updates on our individual tasks, any issues to be brought up, and general discussions on team building.

If the current meeting time does not suit you, let the #assistants channel know and together find a new time that suits you all.

Part 1: Teambuilder Shared Tasks

The following tasks are shared amongst the #assistants team:

1. Greet and Meets
2. Team-building Messages
3. Activity Report Reviews (AR-Subset)
4. Calendar
5. Daily Diary Posts
6. Attending and following up meets
7. Task Handovers / Leave Requests
8. Volunteer Role (VR) Posting

1. Greet and Meets

Greet and Meets are central to integrating new Thrivers, aka. 'newcomers' into the team.

When someone new is about to join the team you will be informed in the #team-builders channel. Once you see their account is active and they join the #general channel, please welcome them as follows:

- **Post a 'Greet and Meet' message in the #general channel.**

  This message should welcome the newcomer to THRIVE and encourage them to attend the week's meetings.

  We encourage newcomers to attend all meetings, especially in their first month to meet the different teams and explore the different tasks and projects.

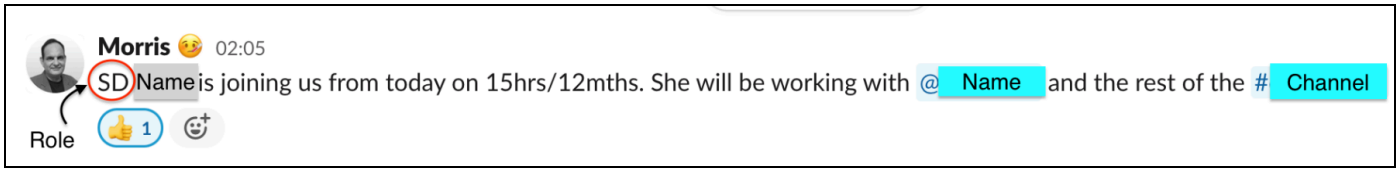
  An example of this message could be:

  "Hi x, welcome to Thrive!"

- **Add newcomers to the appropriate channels**

  When a newcomer is announced in the #orientation channel, you will see their role and some teams/channels where they will be working. Add them to the channels that seem most relevant, and suggest some team leads to connect with.

  A newcomer announcement in **#orientation** will look something like this:



  Roles are often referred to in **short code**, e.g. SD means Software Developer.

  See a full list of the short code for the roles at THRIVE in the **Volunteer Roles tab** of the VR - Volunteering Role Posting Calendar.

- **Send an individual welcome message.**

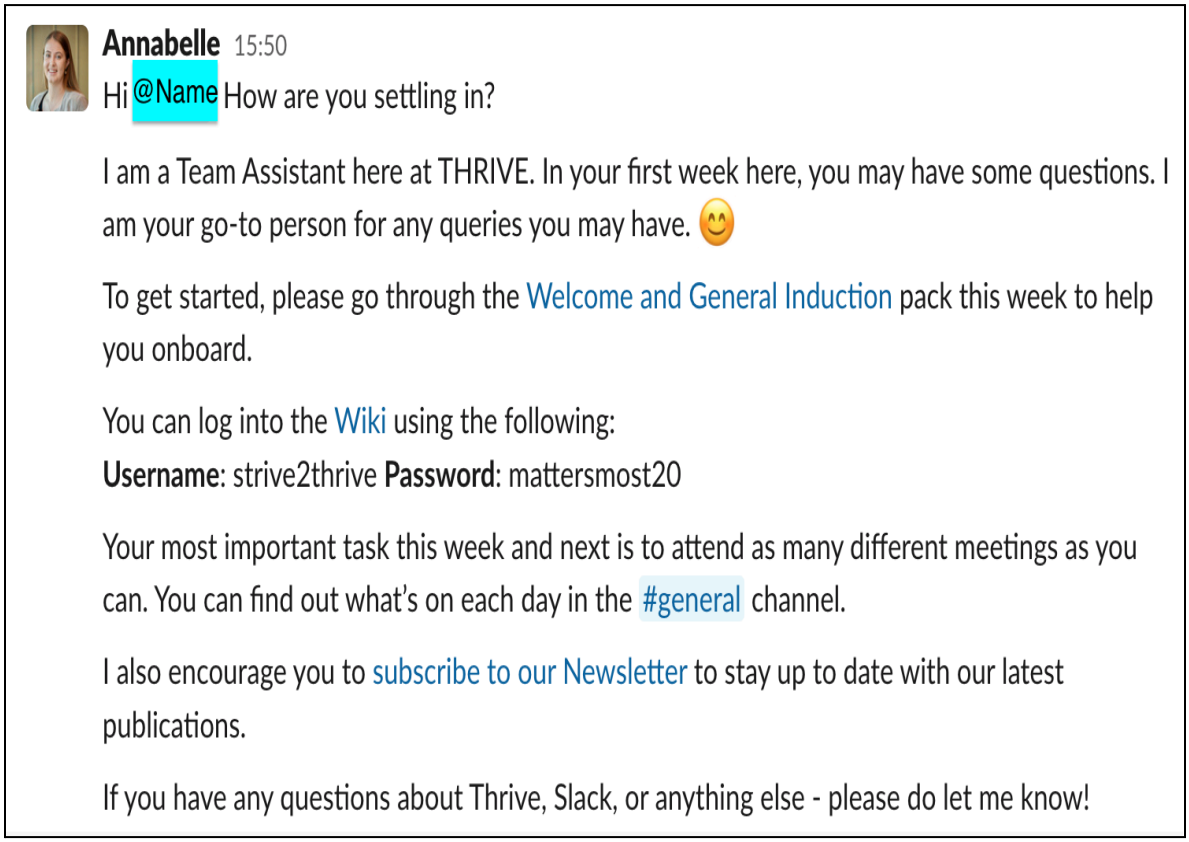
  This message should be friendly and encourage the newcomer to complete key tasks including:
  - Read Welcome Letter
  - Log into the Wiki (provide them the **Username:** strive2thrive and **Password:** mattersmost20)

- RSVP and regularly attend meetings relevant to their role and interests, and If possible as many meetings as possible at least once.
- RSVP and attend the upcoming induction
- Reach out to Team Leads for their relevant team(s)
- Ask them to join #general #events #announcements #helpwanted #it-support #vr-post and #induction. #orientation is optional if they want to know the newcomers.
- Subscribe to Newsletter
- Ask you any questions

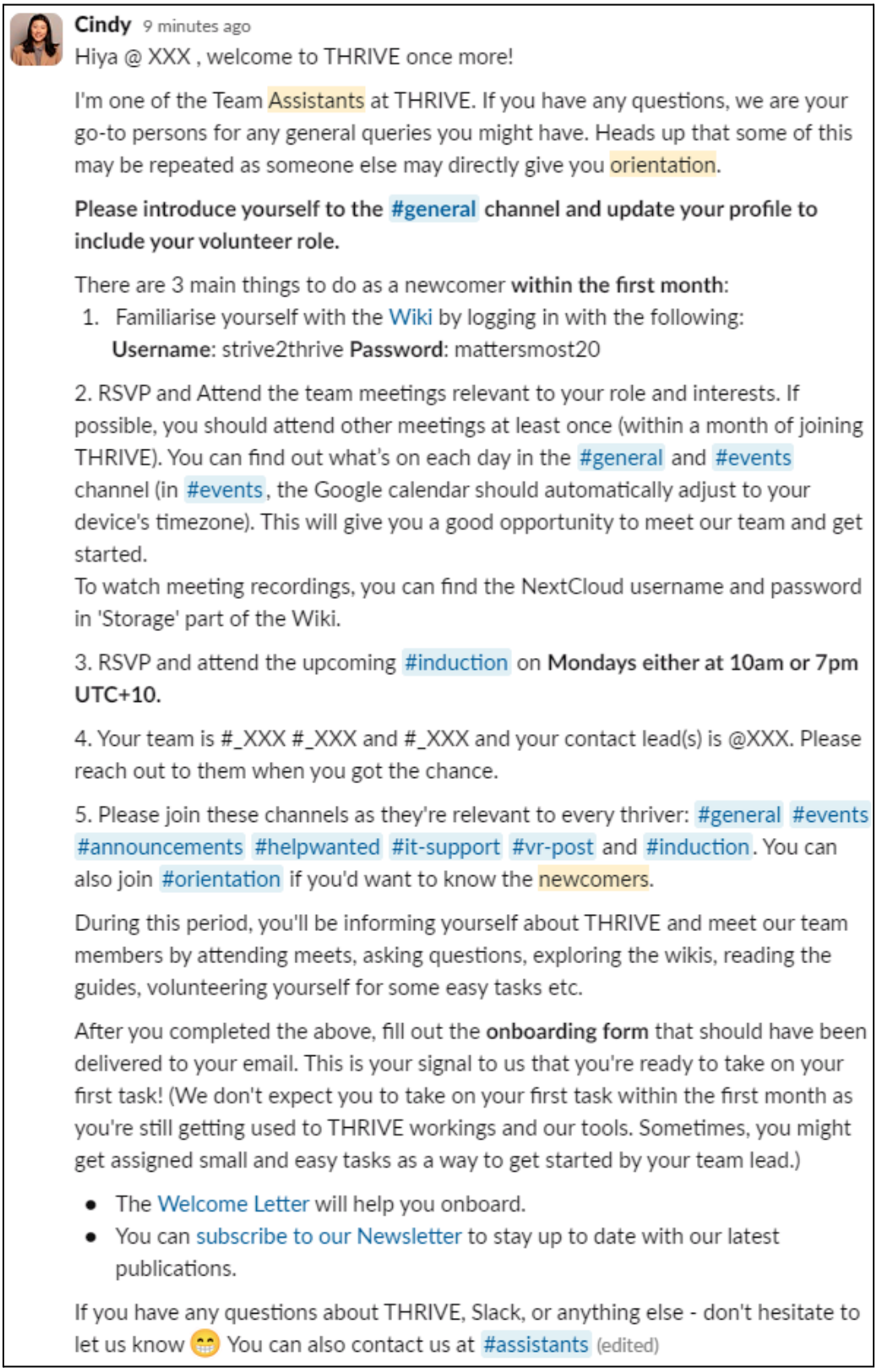
In this message, please include the Onboarding Plan Checklist v1.pdf.

Tailor your initial message to the newcomer. See example messages below.

Example of short individual welcome message:



Example of long individual welcome message:



Cindy 9 minutes ago

Hiya @ XXX , welcome to THRIVE once more!

I'm one of the Team Assistants at THRIVE. If you have any questions, we are your go-to persons for any general queries you might have. Heads up that some of this may be repeated as someone else may directly give you orientation.

Please introduce yourself to the #general channel and update your profile to include your volunteer role.

There are 3 main things to do as a newcomer **within the first month**:

1. Familiarise yourself with the Wiki by logging in with the following:
   Username: strive2thrive **Password**: mattersmost20

2. RSVP and Attend the team meetings relevant to your role and interests. If possible, you should attend other meetings at least once (within a month of joining THRIVE). You can find out what's on each day in the #general and #events channel (in #events, the Google calendar should automatically adjust to your device's timezone). This will give you a good opportunity to meet our team and get started.
To watch meeting recordings, you can find the NextCloud username and password in 'Storage' part of the Wiki.

3. RSVP and attend the upcoming #induction on **Mondays either at 10am or 7pm UTC+10.**

4. Your team is #_XXX #_XXX and #_XXX and your contact lead(s) is @XXX. Please reach out to them when you got the chance.

5. Please join these channels as they're relevant to every thriver: #general #events #announcements #helpwanted #it-support #vr-post and #induction. You can also join #orientation if you'd want to know the newcomers.

During this period, you'll be informing yourself about THRIVE and meet our team members by attending meets, asking questions, exploring the wikis, reading the guides, volunteering yourself for some easy tasks etc.

After you completed the above, fill out the **onboarding form** that should have been delivered to your email. This is your signal to us that you're ready to take on your first task! (We don't expect you to take on your first task within the first month as you're still getting used to THRIVE workings and our tools. Sometimes, you might get assigned small and easy tasks as a way to get started by your team lead.)

- The Welcome Letter will help you onboard.
- You can subscribe to our Newsletter to stay up to date with our latest publications.

If you have any questions about THRIVE, Slack, or anything else - don't hesitate to let us know 😁 You can also contact us at #assistants (edited)

“Please be sure to introduce yourself to the #general channel and update your profile. Also, do RSVP and attend relevant meetings. You can find them in #events/#general and their relevant channels. This will give you a good opportunity to meet our team and get started.”

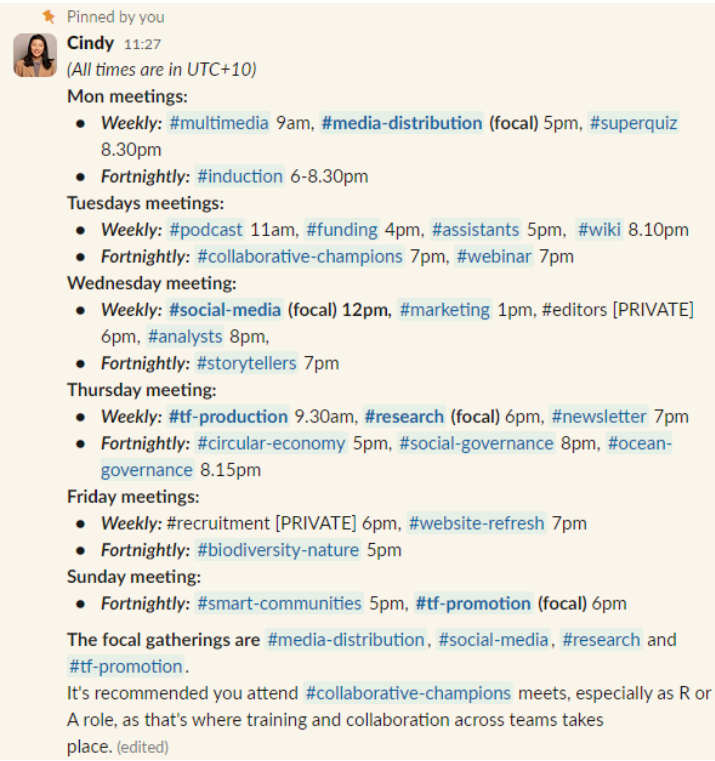
Exploring the wiki can include reading THRIVE’s guidelines, watching past meets (at least 70% or less depending on the newcomer’s schedule), and reading the team's section of the wiki.

Learning about the processes in the wiki is not something one can achieve in one sitting. It requires ongoing immersion over time.

This starts with orientation and basic processes like learning to use Webmail, Slack, and Zoom. They may then move onto Trello, Canva, WordPress, etc depending on their role.

It is important that a TA reaches out to each newcomer and integrates them into our systems.

We also encourage newcomers to be proactive in meetings and volunteering for tasks. However, note that they can also be given assigned tasks.
We check in with thrivers every few days, more or less, depending on how much support the thriver requires. Refer to the **Thriver Outreach Checklist** for conversation starters. A TA may have pinned a list of weekly and fortnightly meets in the #assistants Slack channel such as the one below, and you may forward it to the newcomer to help them schedule their meet attendance.



Pinned by you

Cindy 11:27

(All times are in UTC+10)

Mon meetings:

- ***Weekly:*** #multimedia 9am, **#media-distribution (focal)** 5pm, #superquiz 8.30pm
- ***Fortnightly:*** #induction 6-8.30pm

Tuesdays meetings:

- ***Weekly:*** #podcast 11am, #funding 4pm, #assistants 5pm, #wiki 8.10pm
- ***Fortnightly:*** #collaborative-champions 7pm, #webinar 7pm

Wednesday meeting:

- ***Weekly:*** **#social-media (focal) 12pm**, #marketing 1pm, #editors [PRIVATE] 6pm, #analysts 8pm,
- ***Fortnightly:*** #storytellers 7pm

Thursday meeting:

- ***Weekly:*** **#tf-production** 9.30am, **#research (focal)** 6pm, #newsletter 7pm
- ***Fortnightly:*** #circular-economy 5pm, #social-governance 8pm, #ocean-governance 8.15pm

Friday meetings:

- ***Weekly:*** #recruitment [PRIVATE] 6pm, #website-refresh 7pm
- ***Fortnightly:*** #biodiversity-nature 5pm

Sunday meeting:

- ***Fortnightly:*** #smart-communities 5pm, **#tf-promotion (focal)** 6pm

The focal gatherings are #media-distribution, #social-media, #research and #tf-promotion.
It's recommended you attend #collaborative-champions meets, especially as R or A role, as that's where training and collaboration across teams takes place. (edited)

Newcomer Checklist to mark off the newcomer's progress of their integration.

2. Weekly Outreach (Team-building Messages)

To understand the purpose of team building, please read the Team-building section on **page 25** of the Recruitment and Retention guidelines.

We send weekly messages to all Thrivers. Ensure they are tailored and relevant to the person you are contacting, do not copy-and-paste messages.

Their responses are then recorded in the **AR-subset** or the **Trello Onboarding** and **Integrated Thriver boards** (these will be shared with you and should be kept confidential).

Below are some examples of message templates (be sure to modify for an organic response. NEVER use cut and paste response):

Starter:

"Hi @Name. How are you? I'm a Team Assistant currently taking part in the team building program. Is there anything you need support with at the moment. Please let me know if you require resources, or need my assistance or support from the other THRIVE teams. I'll be glad to help you. Thank you and have a nice day."

Follow up:

"Hi @Name. How are you? As part of the team building program, I wanted to know what project you're currently working on, and if you need any assistance from myself or another Thriver? I would be happy to help you where I can, or connect you with someone else if necessary. Additionally, do not hesitate to share your feedback for THRIVE, so we can keep thriving. Thank you and take care!"

Weekly update (if they haven't completed their Activity Report):

"Hi XXX. How are you? I hope you are doing well. Continuing the team building program, I'd like to ask you several questions to achieve the success of the program. Here's the list of the questions we need you to answer:

- What task(s) did you complete this past week?
- What task(s) are in progress from this past week (and estimated % completion)?
- What task(s) did you start this past week (and who asked you)?
- What project/teams are you working on (this should correspond loosely to a channel)?
- Has anything happened that will affect your hours at THRIVE? (Affecting ability to deliver)

Your answers are helpful in understanding the team dynamics and current projects, so I appreciate you taking the time to explain this. If you need some assistance or find challenges, please don't hesitate to let me know. Thanks!"

Another fantastic starter question is identifying who's self-directed and takes initiative when it comes to their learning and contribution versus those who prefer to listen to instructions and start on tasks. The below is an example of what you could say, but the best messages are personalised and being yourself.



Cindy 12:36
For future reference, how do you best learn and get involved? Do you like to take initiative with self-directed learning or do you prefer to be given instructions and tasks first? (edited)

Before checking on a team member:
When checking up on members, please check the AR-Subset or their Trello card and confirm:

- If their AR is late. ARs will appear as late after 2 weeks of not submitting them. If so, please **remind them** to complete it:
    - This should be coming through to them via Slackbot messages. You can manually send them this link, if you wish.
    - Ask them if they are having any issues with completing their AR. It could be that there is a technical issue. If so, contact the current SA (System Administrator).
- If they are on leave.
- If they have brought up any concerns in the "issues and support" section.

If the same question is being asked repeatedly by different team members, find a way that the answer could be shared with all members. This could be done by updating the guides, adding this information to the induction, or an announcement in the relevant channel.

Report back to #team-building on any issues that you find in the section of the AR or in Thriver's responses to your team-building messages.

2a. Thriver Categories

Every teambuilder is assigned one of the four categories, as well as all the thrivers and newcomers that fall under them. Some team/task channels may be assigned to a TB outside of their category if it's relevant to their skills and interests.

These assignments can be found in the Team/Tasks Support Assignment document. This document has also been bookmarked in the #assistants channel.

These categories are:

DEVELOPERS & IT • #analysts • #developers • #it-support • #superquiz • #systems • #tm-v4-website • #website-refresh • #wiki	ADMINISTRATION (TEAM & HR) • #assistants • #collaborative-champions • #cc-coordinations • #funding • #induction • #induction-coordination • #_teambuilders • #trainers • #_recruitment • #vr-post
RESEARCH • #biodiversity-nature • #circular-economy • #ocean-governance • #researchers • #research-coordination • #smart-communities • #social-governance	CONTENT • #content-strategy • #_editors • #marketing • #newsletter • #media-distribution • #multimedia • #podcast • #social-media • #storytellers • #tf-production • #tf-promotion • #webinar

2b. Tool 1: AR-Subset

The AR-Subset (Activity Report tracking sheet) will be shared with you once you have been trained on team-building messages.

The AR-subset and Trello thriver boards are confidential so do not share it with those outside the team or externally.

The **‘Thrive member’** tab is where you will be documenting responses to team-building messages, and any other key information relevant to that Thriver.

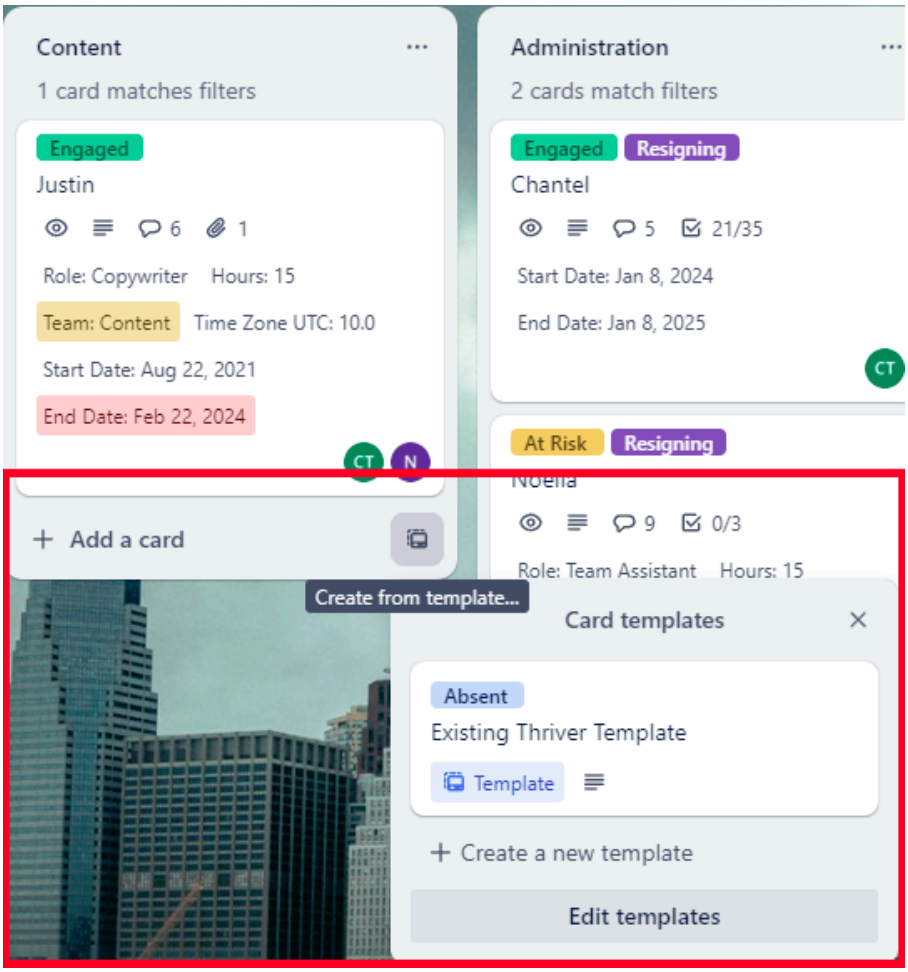
Regularly check the **‘Issues and concerns’** and **‘Leave Request’** tabs.

If you have any questions or if a part of the AR-subset needs fixing, please contact the current SA (System Administrator).

2c. Tool 2: Trello Onboarding and Integrated Thriver Boards

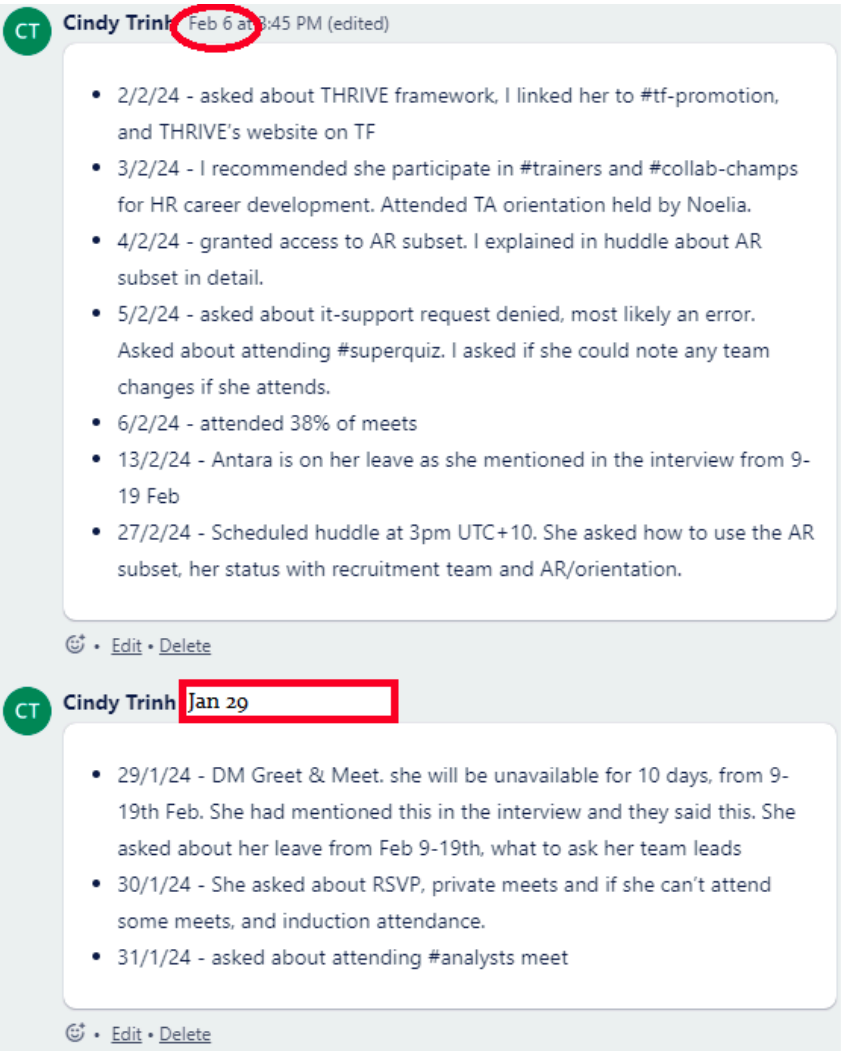
Please refer to THRIVE Team-Builder Trello Training Presenter Version.pptx for more instructions.

1. **HRC** to create a new card for each Thriver before their first day, using their first name as the card name using the details from #orientation. Click 'Create from template…'



2. **HRC** to assign the card to a **TB**, adding the case manager as a "Member".
3. **TB** to use the TA *Onboarding Checklist* and *Meeting Attended* checklist to track onboarding progress through the first 30 days.
4. **TB** to use the *Comments/Activity* field to record attempted and successful contacts (at the time of contact occurring) including support requested and offered, any issues or questions raised, and next steps. This is to ensure others can pick up where you left off in the case you are unavailable.

Below is an example of typed notes. 'Write a comment…' for each month and group all the updates under the same month in one comment by editing them for each check in.



5. If a newcomer is at risk of disengaging from THRIVE, **TB's** to use the "label" function to add an "At Risk" or "Disengaged" tag to the card.
6. Once Day 1 contact has been made and Day 1 tasks have been completed as per Onboarding Plan, **TB** to click the "Completed Day 1" button to move card to the "Week 1" list.
7. Once Week 1 contacts have been made and all Week 1 tasks have been completed as per Onboarding Plan, **TB** to click the "Completed Week 1" button to move card to the "Month 1" list.
8. Once Month 1 contacts have been made and all Month 1 tasks have been completed as per Onboarding Plan, **TB** to click the "Completed Month 1" button to move card to the "30-90 days" list.
9. Once the contacts have passed probation past the 90 day mark, TB to click the "Move" button and select "Integrated Thriver" board to move card to said board.
10. **Setting reminders** - to set a reminder to follow up in 1 day, ensure you are added as a "Member" on the card and click the "Follow up tomorrow" button. Likewise, use the

"Follow up in 1 week" button to set a reminder for 7 days. You can also manually set the due date if you wish to use a date outside these timeframes.

11. **TB's** can use the @ function in the *Comments* to **tag another TB or HRC** for additional input or feedback.

Contact Schedule

- Daily during Week 1
- Twice/thrice per week during Week 2 – Week 4*
- Weekly from Week 5 onwards**

*Subject to support needs. If a team member has identified issues or has disengaged from activities, contacts should be more frequent.

**If a team member does not respond to a request for contact, set a reminder to follow up the next day. Don't leave it for another week, especially if they are also not participating in meetings or contributing to team objectives.

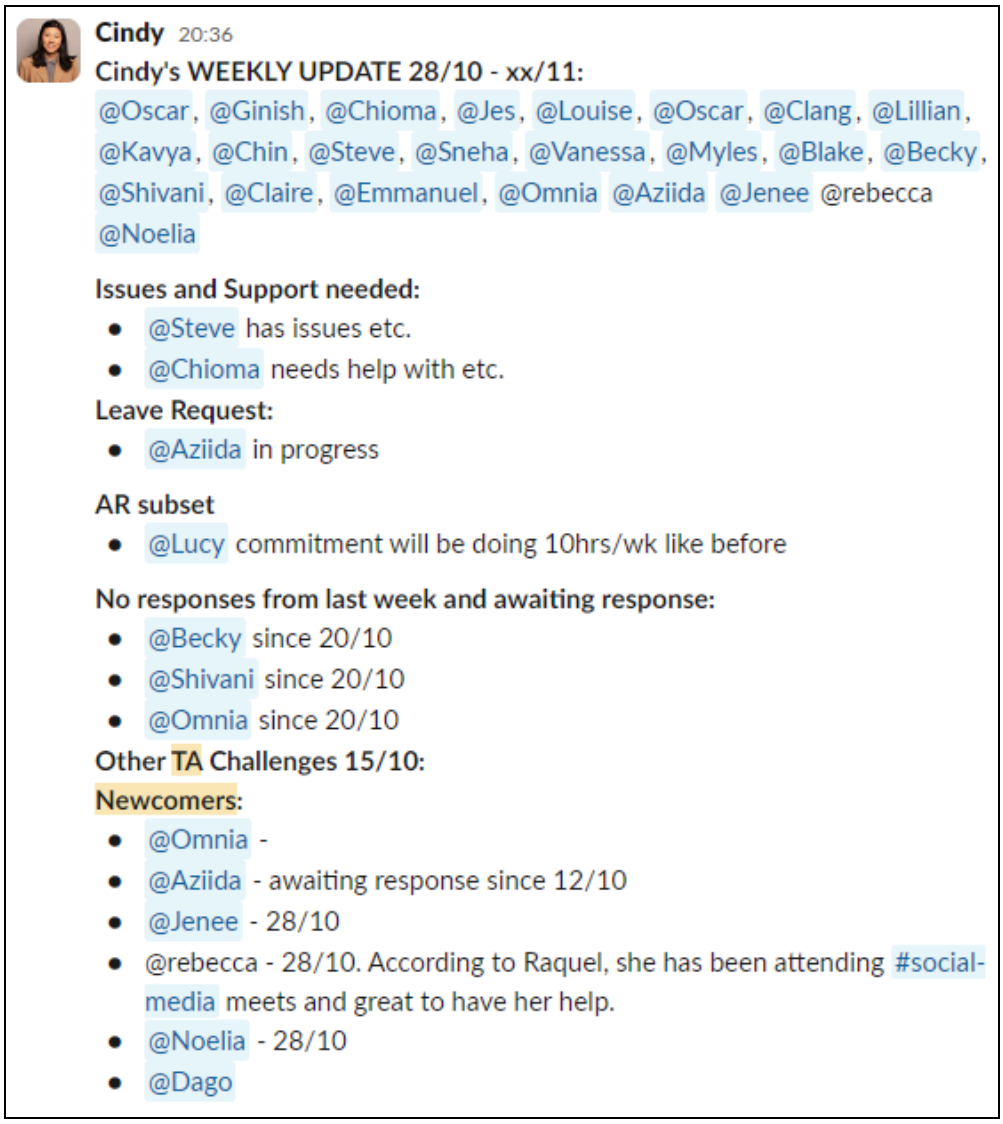
These instructions are also found within the Trello boards.

2c. Weekly or fortnightly updates

If you're tasked with weekly check-ins, then you're most likely in the private team-builders channel. You're required to do weekly updates in this channel. Try to post your weekly updates on a set day.

For each heading, post a separate message so that it's easier for team-builders to reply.

There's no specific format, but here's one example format:



Cindy 20:36

Cindy's WEEKLY UPDATE 28/10 - xx/11:

@Oscar, @Ginish, @Chioma, @Jes, @Louise, @Oscar, @Clang, @Lillian, @Kavya, @Chin, @Steve, @Sneha, @Vanessa, @Myles, @Blake, @Becky, @Shivani, @Claire, @Emmanuel, @Omnia @Aziida @Jenee @rebecca @Noelia

Issues and Support needed:

- @Steve has issues etc.
- @Chioma needs help with etc.

Leave Request:

- @Aziida in progress

AR subset

- @Lucy commitment will be doing 10hrs/wk like before

No responses from last week and awaiting response:

- @Becky since 20/10
- @Shivani since 20/10
- @Omnia since 20/10

Other TA Challenges 15/10:

Newcomers:

- @Omnia -
- @Aziida - awaiting response since 12/10
- @Jenee - 28/10
- @rebecca - 28/10. According to Raquel, she has been attending #social-media meets and great to have her help.
- @Noelia - 28/10
- @Dago

- Names of thrivers contacted
- Issues and Support = what problems you addressed and advice needed
- Leave and handover = who's leave request are in progress and which ones need approval / can be approved. E.g. of a leave request update which includes date of submission and duration of the leave:

Leave Request:

- @Ginish submitted on 23/10/23 for 6/11-19/11/23. Handover in progress, currently following him up. @Claire said he hasn't asked her to take over the #superquiz meets.
- @Clang should be approved for 31/10/23-7/11/23.
- @Aziida submitted on 30/10/23 for 31/10/23 - 7/11/24. Handover complete, no ongoing tasks. For HR to approve.
- @Jenifer submitted on 2/11/23 for 8/11/23 - 19/11/23. Handover in progress, pillar page currently edited by writers. She has to oversee it and hand over to @Shenelle or @Ginish. Her writing section is completed and awaiting feedback by 7th. Will hand over #smart-communities tasks to @Clang once she's back from leave. Currently following her up.
- @Vanessa submitted on 6/11/23 for 30/11/23 - 2/1/24. Handover in progress, currently following her up.
- @Ben submitted on 6/11/23 for 25/12/23 - 8/1/24. Handover in progress, says he's still working it out and will inform me. I will follow him up later.
- @Shivani submitted on 6/11/23 for 12/11/23 - 3/1/24. Handover in progress, website and marketing tasks. Currently following her up.

- AR subset = general updates
- No response = sometimes thrivers may forget to reply for a week. 2-3 weeks without a response can be a sign that they're going inactive
- Other TA challenges = such as following up meets, people, etc.
- Newcomer = monitoring how newcomers are coming along, meet attendance, task participation, etc. What stage of the integration process are they in?

3. Task Handovers for Leave Requests and Resignations

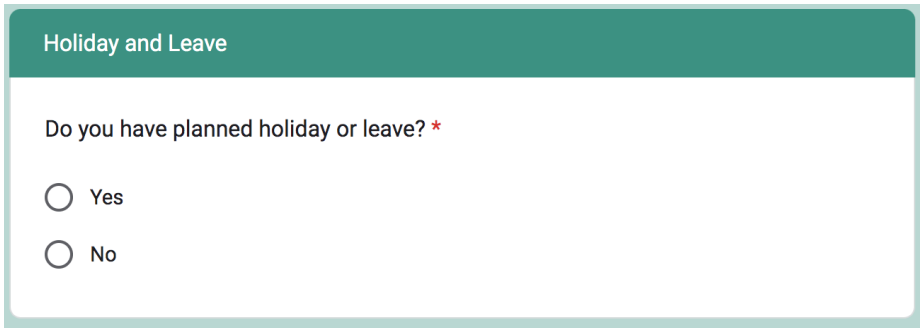
3a. Applying for Leave and Resignation

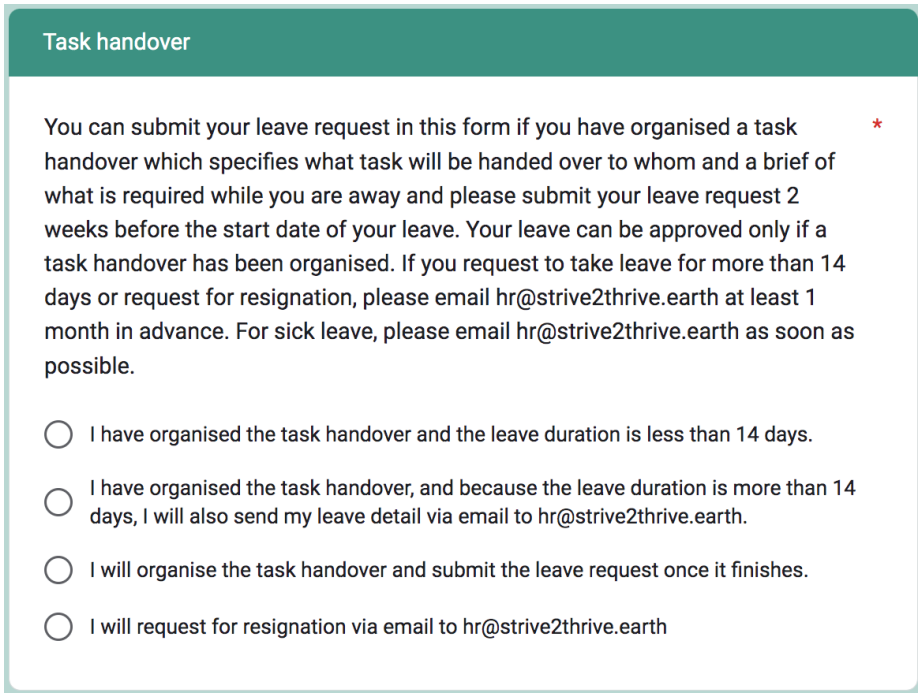
Thrivers may ask you how to submit **Leave** or **Resignation**. As of 16/06/2024, Leave and Resignation processes are initiated through Slack (Tool 2) due to the Activity Report currently not working. Please talk to your team to check the current tools in use.

A TA can also do this task, but they will require access to the tools required to record the handover updates (AR-Subset or Trello boards).

3a.1. Tool 1: Activity Report

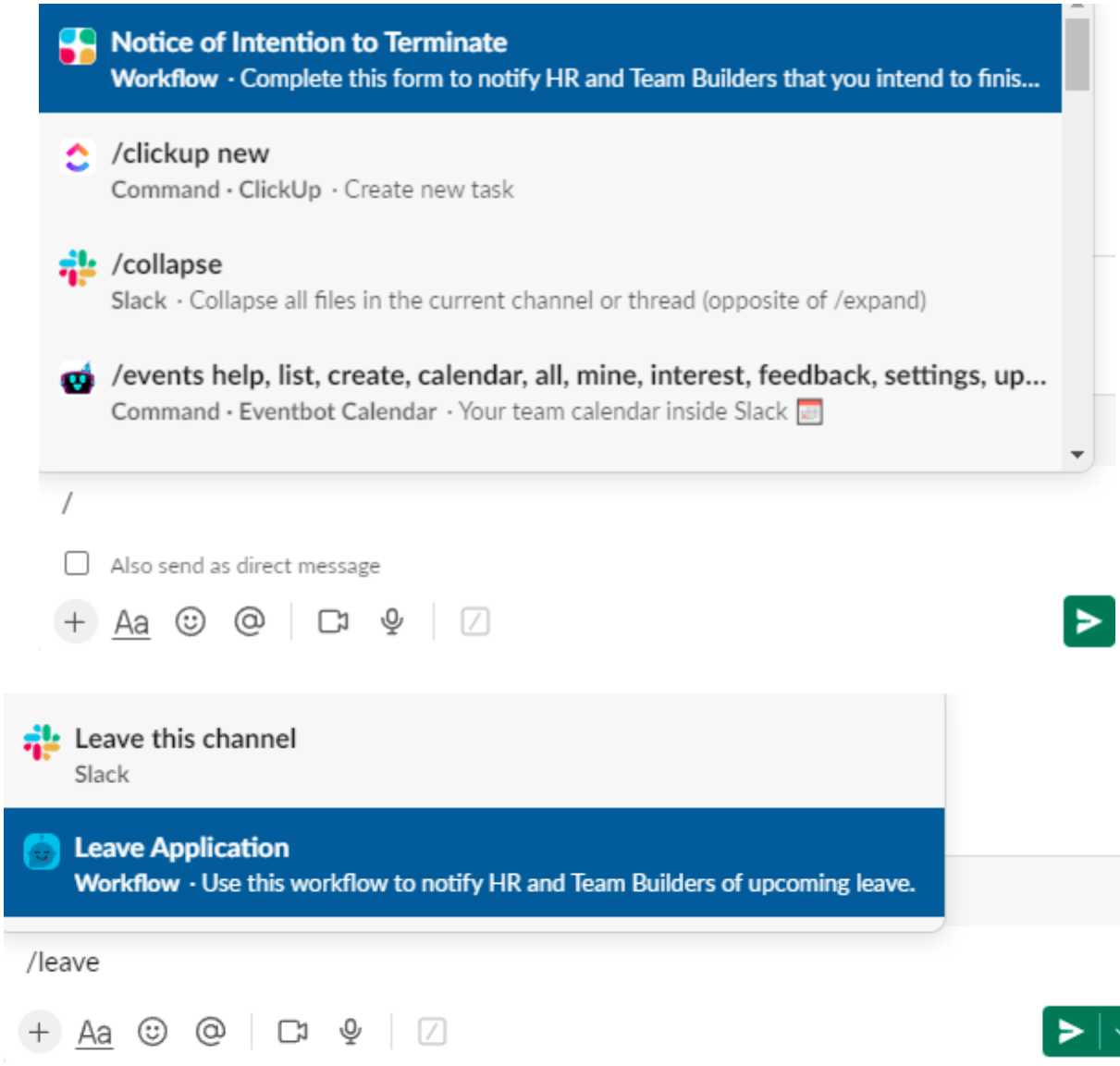
These are done through the Activity Report. See the questions from the Activity Report below.





3a.2 Tool 2: Slack

THRIVE has deployed a '**Notice of Intention to Terminate**' and **'Leave Application'** function in Slack and it's in the testing phase. To do so **forward slash / in the message box and type 'resign' or 'leave' to select the 'Notice of Intention to Terminate' or 'Leave Application' option.**



3b. Prior to Submitting a Leave Request

Before submitting leave in the Activity Report, Thrivers must organise task handover specifying what tasks are to be handed over to whom, and details of the task.

3b.1. Leave of 14 days or less

Leave requests of 14 days or less should be submitted **at least two weeks in advance** of the leave start date, where possible.

They also have to let a Team Assistant/Team Builder know who will relay it to the team builders.

Leave for **14 days or less** can be approved by Team Assistants.

3b.2. Leave of more than 14 days

Leave of more than 14 days must be requested in the Activity Report and by emailing hr@strive2thrive.earth **at least 30 days in advance**, and also informing a Team Assistant/Team Builder.

Leave for **more than 14 days** can only be approved by HR.

3b.3. Leave Approval

Leave can only be **approved** if handover has been completed. Otherwise, if you take leave without this approval, your status will be AWOL (absent without leave). If the leave has been approved, it should show up in the next Activity Report on Friday.

3b.4. Resignation

To resign from a role at THRIVE, an email must be sent to hr@strive2thrive.earth notifying HR of their intention to resign and provide 30 days notice.

Handover must be completed and all relevant documentation must be updated before resignation becomes effective following 30 days notice.

3b.5. Handover Process

Team assistants can assist in the task handover process by communicating the **requirements of task handover** and **assisting to find a replacement Thriver.**

Team Assistants must confirm that both sides are on the same page about the list of tasks to be handled by the replacement for a specific period of time.

If Thrivers share that they **intend to take leave or resign**, be sure to also **share these task handover steps** with them..

3b.6. Requirements of Task Handover:

The Thriver who is taking leave or resigning must ensure:

1. Relevant documentation is up to date to reflect the latest processes.
    a. Give access to relevant to the trainee.
    b. ‘How to’ manual
2. Sufficient training of the replacement Thriver for the role or task has been undertaken (over the course of a month minimum).

3. The replacement Thriver is capable and willing to complete the new task or role.

Handover is not a 1 day affair. Typically handover takes place over a period of a month whereby the newcomer takes over the role.

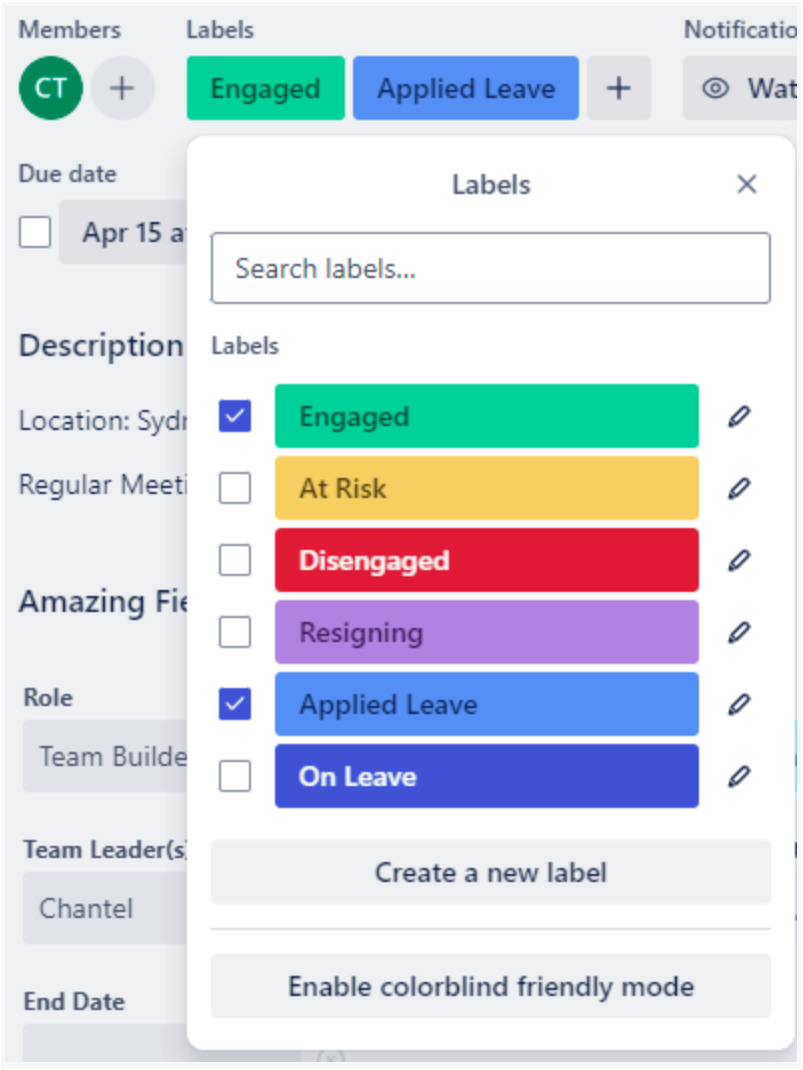
The incumbent is to train the newcomer until they are competent at the task. Incumbent supervises the replacement in meetings and such.

The newcomer should have updated guides and training provided and be telling the incumbent (and the TA in charge) that they are satisfied they can do the task before the incumbent finishes up.

The rule is that the newcomer will need to run sessions as the primary with the incumbent present, until they are competent to deliver the same without the incumbent present.

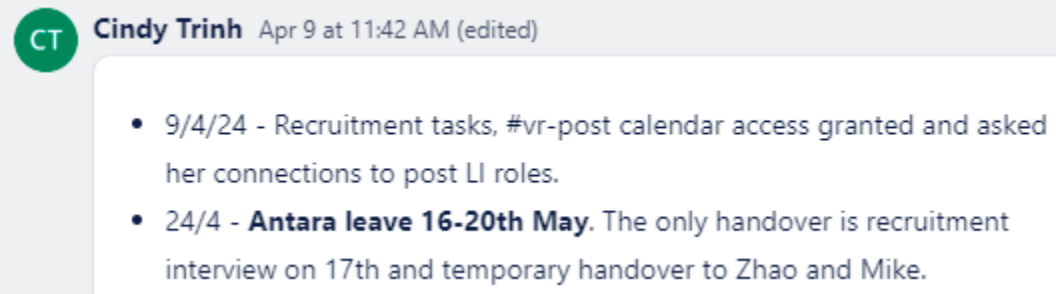
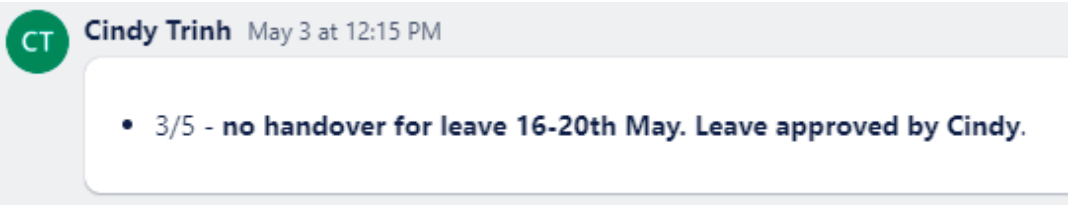
3b.7. Handover Process Checklist

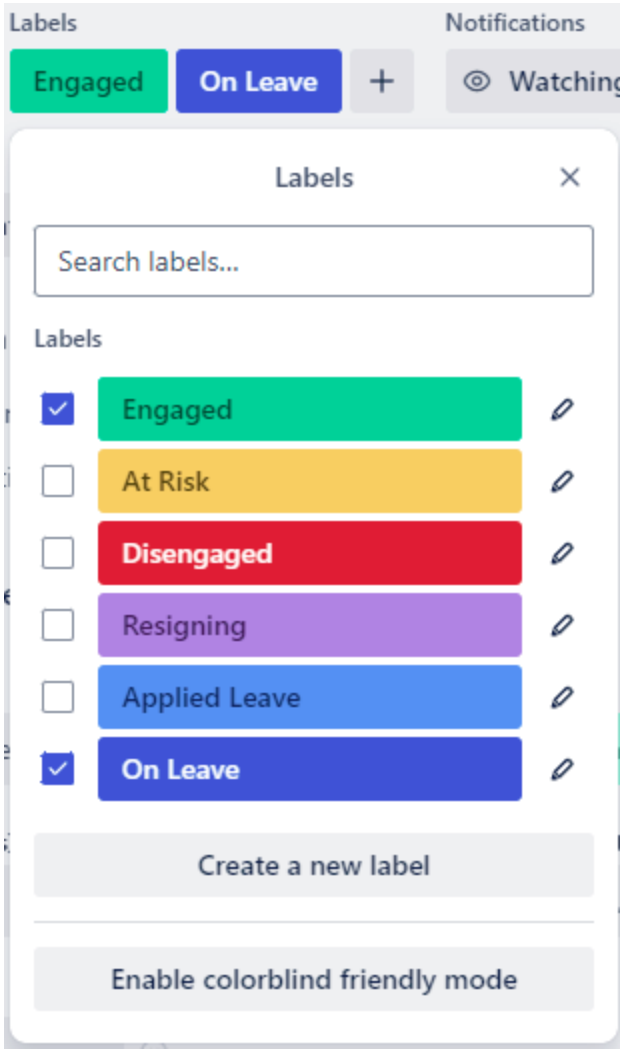
Steps	Notes
1	Contact leave applicant and confirm the details of their leave: ● Leave request date, leave start date, leave end date and duration of leave. ○ E.g. “Hi @, You have submitted leave on xx/xx/202X from xx/xx/202X (leave start date) to xx/xx/202X (leave end date) for X days (duration of leave). Is this correct?” ● List of tasks (and for what teams) to be handed over, and thriver replacement taking on the tasks for the duration of the leave (or permanently in case of resignation) ● List of tasks to be completed before or after leave. ● Training plan (for a month minimum) for the replacement thriver (if they haven’t done the task before) to ensure their competency to take on the tasks. ● Resources and access granted to replacement thriver. ● Provide the leave applicant this Leave/Resignation & Handover Checklist. ● **Add the ‘Applied Leave’ or ‘Resigning’ label on the leave applicant’s Trello card**


Members
Labels
Notificatio
CT
Engaged
Applied Leave
Wat
Due date
Apr 15 a
Description
Location: Sydr
Regular Meeti
Amazing Fie
Role
Team Builde
Team Leader(s)
Chantel
End Date
Labels
Search labels...
Labels
Engaged
At Risk
Disengaged
Resigning
Applied Leave
On Leave
Create a new label
Enable colorblind friendly mode

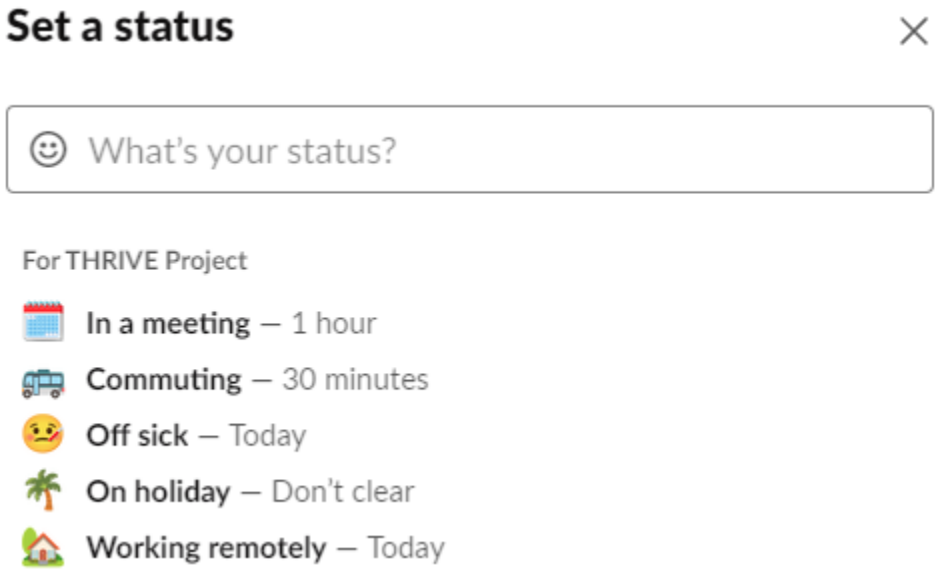
	Example of a handover list for Social Media Lead (SML): • Editing the Podcast series, Thriveable Life (Not Future that's Justin) --> handed over template/files to @Justin • Managing the Twitter --> @Steve • Managing the LinkedIn --> @Steve • Creating graphics for: Sustainable Tips, International Days (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
2	Contact thriver replacement and confirm: • If they've agreed to receive handover • If they're aware of the leave duration and/or resignation • If they know what the tasks entails ○ E.g. "@ said you'll be managing the calendar in scheduling meeting time changes and help find suitable meet times, etc. Is this correct?" • If they feel confident to handle the task in the incumbents' absence • If they have access to a guide or know who to contact should they run into issues while undertaking the tasks • If they have begun training with the incumbent and know what their training plan/handover entails

3	Monitor the handover process. Contact both the incumbent and thriver replacement once or twice per week leading up to the incumbent's leave date:
	• Confirm the progression of the thriver replacement's readiness with the incumbent.
	  ○ What tasks have they been informed of?
	  ○ What resources do they have access to?
	  ○ Does any permissions to tools and resources need to be granted?
	• Confirm replacement's readiness and confidence with:
	  ○ What tasks can they do?
	  ○ What resources do they have access to and if they know where to

	find them. ○ Are there any permissions for tools and resources they need granted? ○ When will their training be completed? ● Is there anything TA/TB can assist with? ● **Update both thrivers' Trello cards as you monitor the handover progress.**  CT **Cindy Trinh** Apr 9 at 11:42 AM (edited) • 9/4/24 - Recruitment tasks, #vr-post calendar access granted and asked her connections to post LI roles. • 24/4 - **Antara leave 16-20th May**. The only handover is recruitment interview on 17th and temporary handover to Zhao and Mike. ● The sooner the leave start date, the more you should contact the leave applicant/resigner to finalise their handover. ● **Update the #_teambuilders on the handover process.** ●
4	Confirm completed handover when replacement thriver can competently complete the tasks assigned. ● When step 3 is completed, the TA can mark the handover process as completed. ● TA/TBs can request for the leave to be approved in #_teambuilders if the leave is more than 14 days. If the leave is less than 14 days, and the TA/TB approves, they can mention in the channel e.g. "I have approved of @name's leave as the details of their handover is as follows…" ● Update the thriver's Trello card on the status of their leave. E.g.  CT **Cindy Trinh** May 3 at 12:15 PM • 3/5 - **no handover for leave 16-20th May. Leave approved by Cindy.**
5	Once the thriver is on leave, update their Trello card labels to reflect this status. You can remove it once they have returned.



Remind the thriver to update their Slack status e.g.



Finding a Replacement Thriver

If the incumbent does not have a replacement organised, ask if they have any candidates in mind.

If not, then Team assistants can help with finding a replacement Thriver for the task or role.

In doing so, please review the following information:

1. **AR-Subset**
    - **Thrive Member** tab: Review latest updates on possible replacement Thrivers
    - **Weekly Summary** tab: Check the current availability and if they have time to take on new tasks

2. **Tribe Overview Subset**
    - **Overview** tab: Review the **Role** and **Qualifications** columns
    - *Note other tabs in this spreadsheet are not updated as of May 2023.*

You can also ask other Thrivers for guidance on this, if needed.

Part 2: Team Assistant Shared Tasks

1. Calendar

This isn't so much a shared task, as one TA is in charge of it but at least two people should have access to the calendar as a backup.

Every single meeting should be scheduled, including private meetings, such as the editors or recruitment, and orientation training sessions.

Private meetings shouldn't include the meeting link.

When scheduling meetings, ensure that they don't clash. Exceptions would be that the attendees don't need to attend the other meet it's clashing with, but even then, it's the last case scenario.

Don't put meetings between 6-8.30pm Monday as #induction can move between those times.

2. Daily Diary

The Daily Diary (DD) is important because it keeps everyone informed about the current meetings for the day, any cancellations or changes, or meeting-related announcements. It also provides a quick and easy way for everyone to find the correct Zoom link for that meeting.

The TA responsible for this sends daily reminders to #general about the meetings that are happening that day.

Before the day of the meeting, send a message into the #general channel:

"Hi everyone, here are the meetings for today, **[Day, DD, Month, Year]**:

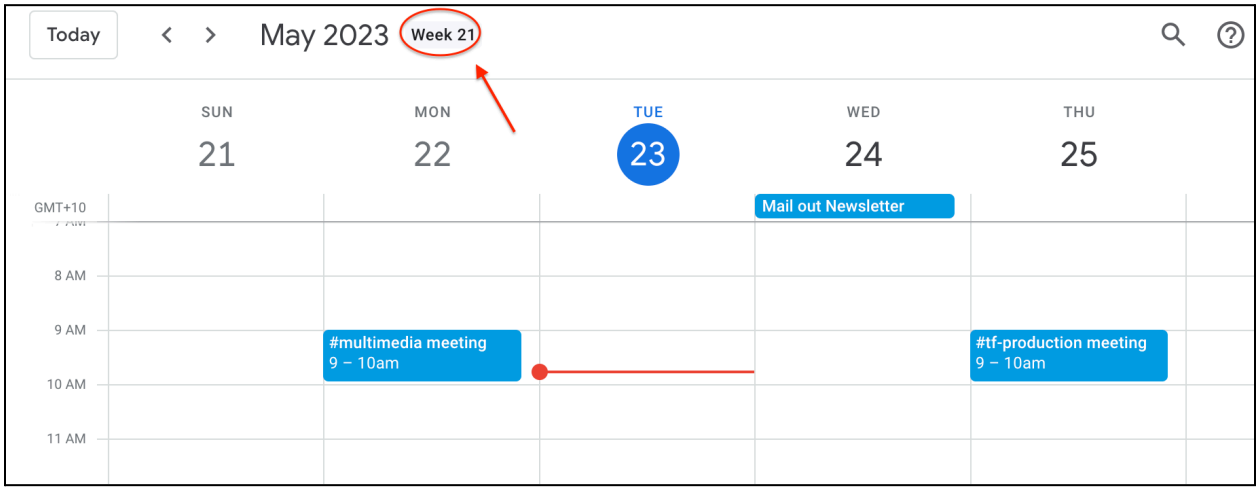
- #(channel name), Time UTC +10. Link:
- #(channel name), Time UTC +10. Link:

Please RSVP your attendance in the channels. Thanks!"

Mondays

On **Mondays**, also include the **Week Number** after the **[Day, DD, Month, Year]**, to help everyone stay oriented within the overall calendar.

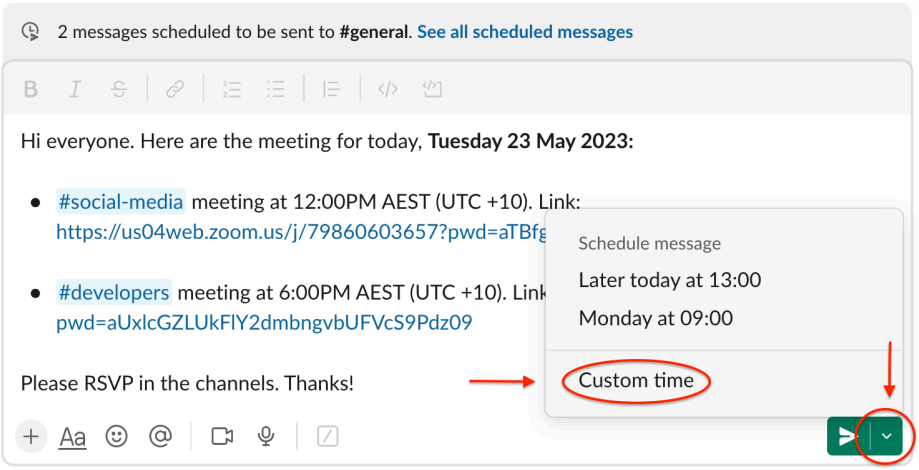
The Week Number for each week can be located in the THRIVE Project Google Calendar here:



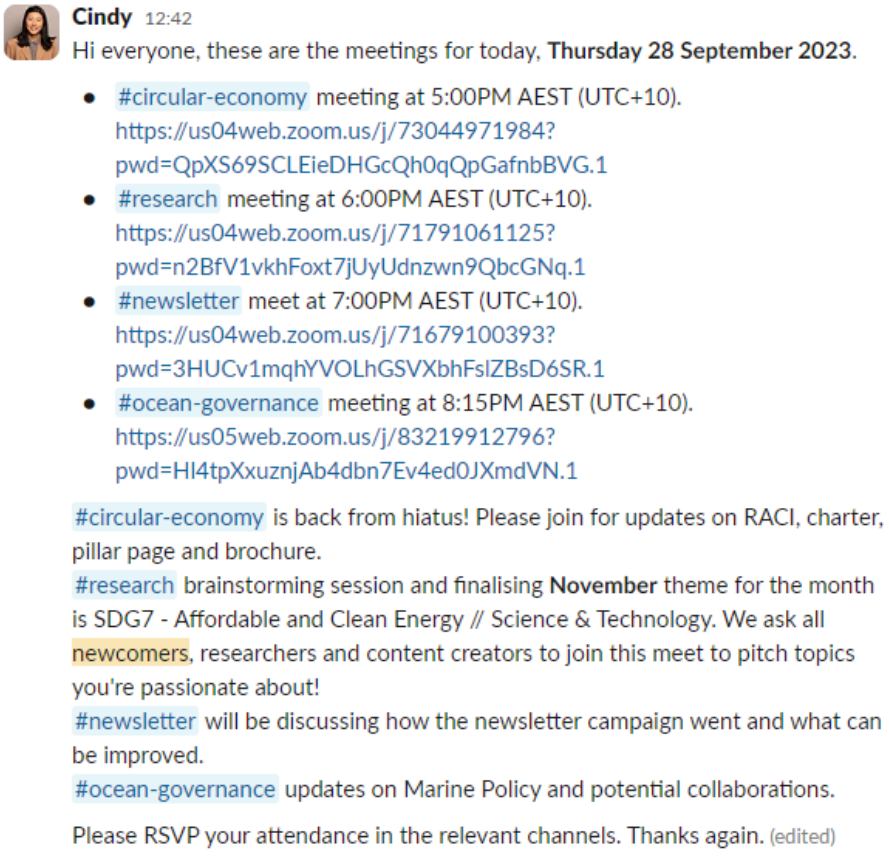
Scheduling messages

Schedule the messages to be sent to the #general channel around 00:00AM on the day. It's recommended to be set at midnight so that people from all timezones are able to see the DDs in a timely manner. Click the **down arrow** button to do so.

You can view and edit previous scheduled messages by clicking **See all scheduled messages**.



What else to put in the DD?



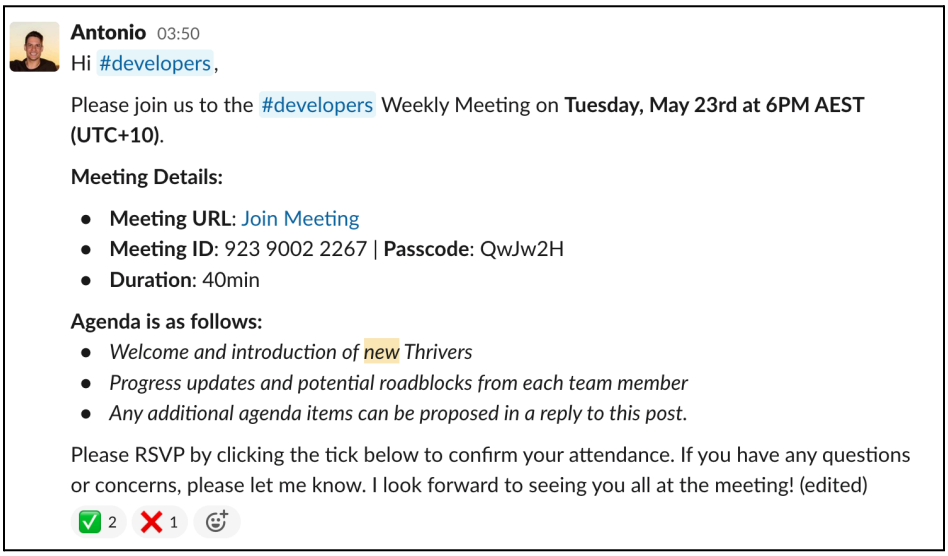
To increase attendees at these meets, you can write out announcements (which can be sourced from the agenda) and encouragements to specific roles (newcomers, researchers, content creators, etc.) to join.

These extra messages can also serve as a way to check which team/task channels have posted their minutes and meet invites.

How do I know what meetings are happening when?

First, **refer to the Thrive Google Calendar**, which is editable when logged into *thriveprojectcalendar@gmail.com* (Please ask #it-support and tag @Morris for access to this, if you are responsible for posting DD).

Next, **check the Slack channels** for the scheduled meetings to find the Zoom/Google Meets Links and a confirmation that the meeting is going ahead. See example below from the #developers channel:



Daily Diary FAQs

What if there is no meeting confirmation in the Slack channel?

Occasionally the team lead who will be hosting a meeting may forget to post their meeting confirmation. You can gently remind them to post it with a message like this in the channel.

"Hi @Name and #channel, I see that you have a meeting scheduled for [TIME] and [Day/Date]. However, I cannot locate your meeting confirmation message here.
Please post it ASAP and remember to include:

- Meeting time and date
- The meeting link
- The agenda
- RSVP request

Thanks! “

What if there are no meetings for that day?

You do not need to send a DD message if there are no meetings or events for that day.

Check the Google Calendar to be certain there are no webinars, conferences, or other events you could remind people about.

What if the meeting has been cancelled or postponed?

It is strongly encouraged that meetings are **not** cancelled or postponed, as there is almost always another team member who would be willing to host.

You should encourage or invite someone else within the team to host, whenever the current host says they would like to cancel/postpone the meeting.

When find that cancellation/postponement is unavoidable, please inform people via the #general that the meeting has been cancelled/postponed.

How many Daily Diary posts can a schedule in Slack?

You can usually schedule around 15 posts in advance. It is recommended that you don’t schedule too far in advance as there are sometimes changes to meeting times on the week of that event. It is important that the details you send in #general for your Daily Diary posts are correct so everyone is up to date and can easily access the meeting links.

3. Attending and following up meets/events

Ensure that meets stay within **40 mins**. It reduces storage space issues in NextCloud but also people are likely to be more productive within that timeframe.

It's recommended that minutes are posted within 48 hours after a meet. There are a few reasons for this:

- **Attendance records** are helpful in knowing who's active, who's missing, etc., especially if someone is here on an internship, we need evidence for their hours.
- These minutes must include **next action items** so that team members know what to do up until the next meet.
- It's **evidence** for bodies such as the research council that THRIVE is productive and activities are running. If there's lack of proof, it may affect THRIVE in areas such as #funding and grants.

Similarly, within 48 hours, the next meet invite details, agenda and RSVP request must be uploaded as a separate post **at least a week in advance before the meet**. This is because

it gives our thrivers plenty of notice for their schedules, and avoids confusing newcomers when they don't see a meet to RSVP. It also allows our thrivers to prepare ahead of time, read the material, etc., which might help cut down meeting times.

There's no strict process to how you follow up a meeting. But basically:

After 24 hours the meet has happened (the second day after the meet), if there's no minutes or event details, put a reminder in the #channel that may look like this for e.g.

"Hi #funding, @team lead1 @team lead 2, your meeting is scheduled for **4:00PM AEST (UTC+10) Tuesday 26 September 2023** on the Google Calendar. Could you post your meeting confirmation ASAP and include:

- Meeting time and date
- The meeting link
- The agenda
- RSVP request"

If they still haven't after that, and the meet's around the corner, directly message the team lead/meeting host.

#induction follow up

If you are in charge of monitoring #induction and #induction-coordination, it's crucial to follow up on a regular basis as it affects the newcomer integration process if event details aren't available for them to RSVP.

You need to ensure:

- Event details such as link, date and time and RSVP request has been posted.
- Induction holder (trainer) has confirmed their role and availability.
- Room link highly recommended to be able to record 1-1.5 hours (preferably by the induction holder, but as a last resort, the TA can provide a room link if they're able to record long sessions).
- At least 1-3 days before induction, direct message the newcomers (with a reminder) and team leads (request to attend).

4. Volunteer Role (VR) Recruitment

Team assistants also help with recruitment from time to time. Most importantly, when needed TAs will assist with LinkedIn job posts, also known as **VR Posts**. See #vr-post channel for current discussions.

VR Posts (LinkedIn)

One way THRIVE promotes its volunteer roles is through **LinkedIn**.

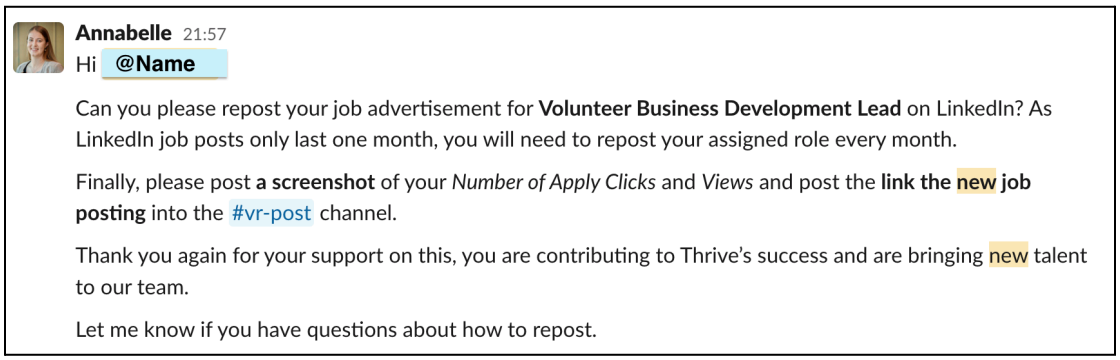
Free accounts can only promote 1 job advertisement at a time, so we ask Thrivers to help with this task. The posts usually **expire** after around 21 days and may be automatically **paused** by LinkedIn if the job posting reaches the maximum number of applicants or views.

Each Thriver is asked to post **one role per month** on their personal LinkedIn.

VR Posting Responsibilities

1. **Refer to** VR - Volunteer Role Posting Calendar to see who should post which role.
2. **Check** THRIVE Project's LinkedIn Job Posts to confirm which roles are currently being advertised and by who.
3. **Return to** VR - Volunteer Role Posting Calendar and check-off currently advertised roles.
4. **Unadvertised role job postings** should be followed up weekly.
    - **If there is an allocated Thriver,** remind them to repost the job on their LinkedIn.

      Example VR post reminder message below:



Annabelle 21:57

Hi **@Name**

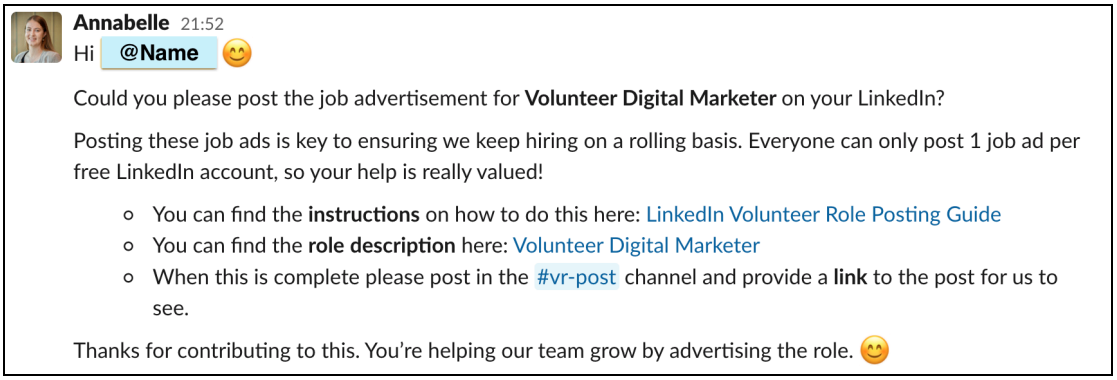
Can you please repost your job advertisement for **Volunteer Business Development Lead** on LinkedIn? As LinkedIn job posts only last one month, you will need to repost your assigned role every month.

Finally, please post **a screenshot** of your *Number of Apply Clicks* and *Views* and post the **link the new job posting** into the #vr-post channel.

Thank you again for your support on this, you are contributing to Thrive's success and are bringing new talent to our team.

Let me know if you have questions about how to repost.

    - **If there is no allocated Thriver**, choose someone from Tribe Overview who does not already have an allocated role and ask them to post the job on their LinkedIn. Ideally you would choose the person currently in that role to advertise their own role. **Example VR post request message below:**



You can find the **LinkedIn VR Posting Guide** here: +LinkedIn VR Posting Guide

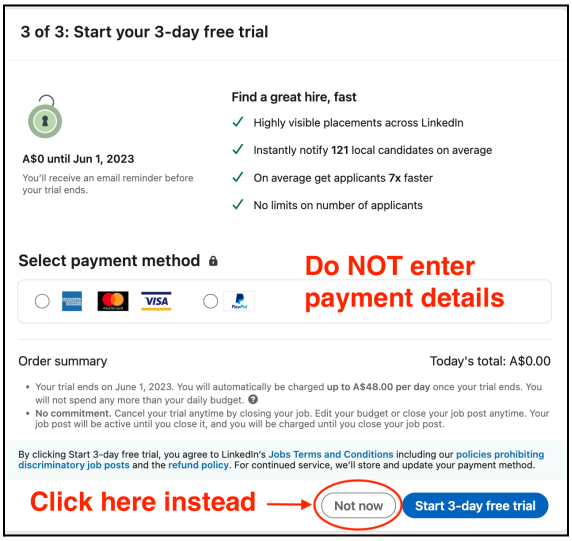
All current **Volunteer Role Descriptions** are located here: VR Outlines

Full instructions on **How to Post a Volunteer Role** on LinkedIn, found on **page 10** of the THRIVE Recruitment and Retention Guidelines.

5. **Check all links** that are shared in #vr-post following a new or reposted role to confirm the job has been posted correctly.

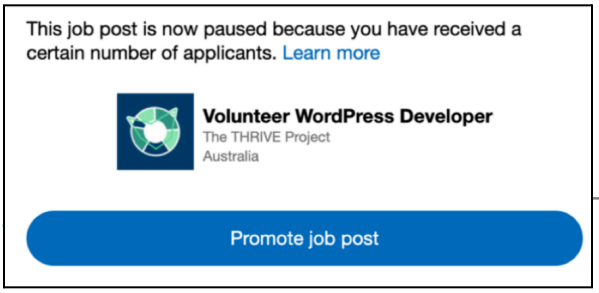
Troubleshooting LinkedIn VR Post Issues

Issues sometimes arise with Linkedin job posts. Please see **common issues/solutions** below.



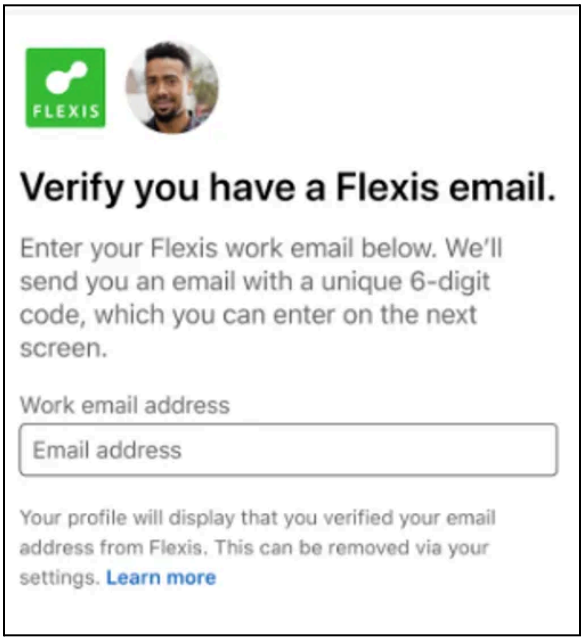
Issue 1: LinkedIn suggests that they can only post the role if they **pay** to promote it.

Solution: This is not the case, there is a 'Not Now' button that they can use to proceed.



Issue 2: LinkedIn has paused the job posting before it expired.

Solution: Close the job posting manually and repost the job advertisement.



Issue 3: LinkedIn asks them to verify their "company email address".

Solution: Enter their Thrive email address (e.g. annabelle.r@strive2thrive.earth)

Note: Image on the left is an example only.

If an applicant messages the poster that they want to further discuss the position, ask the poster to screenshot their message and share their contact details to the #recruitment channel so that they can be contacted.

Additional Recruitment Support (Optional)

When there are multiple team assistants, there may be time to assist further in recruitment. This role could include:

- Looking over the THRIVE volunteer advertising platforms (see below)
- Attending #recruitment meetings,

- Assisting in Group Interviews and helping to conduct the group interview discussion section. The questions and structure can be found in the Recruitment and Retention guidelines,
- #induction-coordination: Assisting in creating the materials for induction, presenting it to newcomers, and collaborating with other team coordinators if new information were to be included or presented differently.
- Helping review and pass on the sample briefs for evaluation
- Finding more job platforms to advertise on
- Provide updates on which roles are currently being advertised on LinkedIn in the #recruitment channel
- Suggesting better ways to improve the recruitment process

Here is a list of the volunteer platforms where we advertise THRIVE:

- LinkedIn (posts expire after 4 weeks)
- Indeed Jobs. THRIVE Account: indeed@strive2thrive.earth
- Idealist. (volunteer posts expire after 6 months) THRIVE Account: idealist@strive2thrive.earth
- Seek (posts expire after 3 months): THRIVE Account: Morris.Fedeli

This is the criteria for finding an appropriate platform to advertise our roles on:

- **Is it Free?** Sometimes some platforms will be free for not-for-profit/volunteering organisations
- **Is the website linked to sustainability?** This is not necessary, but if you could find one, that would be great.
- **Can applicants apply through a website?** Like LinkedIn, there is a button where it allows applicants to apply through a website. We would want this so that applicants can go through the application process. If this is not the case, you either have to send them individual or automated messages that redirect them to the THRIVE volunteer website.
- **How long are the posts active for?**
- **Is it internationally based?**

When you find new platforms, be sure to record them in this sheet which has the criteria above. From there, decide whether THRIVE should set up an account. Then share these platforms in the #recruitment channel.

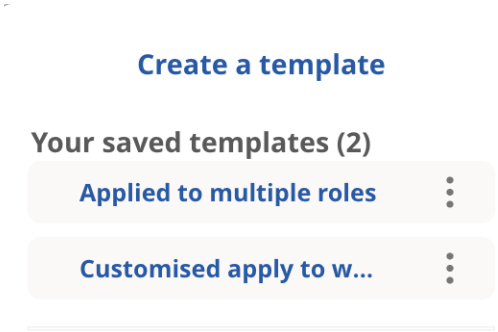
Messaging on IndeedJobs and Remotehub.

On these platforms, there is no option to have applicants apply directly to the website. Therefore, it is important that you send them messages asking them to apply to the website.

The standard message is: “Hi (name), thank you for your interest in volunteering with the THRIVE Project. Interest has been mounting, so we have switched to a robust system whereby we can collect your details and provide a more tailored response. As such we invite you to apply at the volunteer website found here: https://strive2thrive.earth/volunteer/

Thank you and do keep on thriving!”

On Indeed, I have made a customised template.

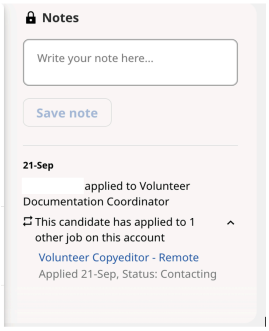


This appears when you are going to send a message to an applicant on Indeed. There are 2 options for the customised templates:

1. Applied to multiple roles. - This is a message for someone who has applied to multiple roles. Only the top sentence has changed and it directs them to the website
2. Customised apply to website

Before sending a message to the applicant, check on the right hand of the screen to check if they have applied to other roles. As seen below.

You will know if you have already messaged the applicant if the status of their application says “Contacting”



If they have, make sure to only contact them once and use option 2 for the message.

5. Research Support (Optional)

When there are multiple TAs, one may be allocated to the Research team, #tf-promotion and the clusters specifically. Please refer to the Team/Tasks Support Assignment document bookmarked in the #assistants channel.

This role would involve assisting the roster of the research meeting.

This happens in the #research-coordination channel.

Please refer to the 'How to run a research meeting document' and the Research Presentation Calendar of the wiki.

RACI

Here is the presentation for RACI.

RACI is the acronym for (**R**esponsible, **A**ccountable, **C**onsulted, **I**nformed) and it is used to define the different roles and responsibilities within the team.

We want all teams to follow this model, especially new teams formed.

We usually want two **R**'s, one **A**, multiple **C**'s, and multiple **I**'s.

Abbreviation	Represents	Definition
R	Responsible	Those who do work to achieve the activity, there can be multiple resources responsible. It is attributed those championing the initiative
A	Accountable	The role/resource who will sign off on the work and judge its completion and how it meets quality standards. There must be only one "A" specified for the team.
C	Consulted	Those whose opinions, skills, knowledge are sought to complete the activity.
I	Informed	Those that need to know about the activity. That need to know about the decisions, progress and results achieved

Be sure to familiarise yourself with this as you will be conveying this information back to team leads or ‘champions’.

Benefits of RACI

- RACI allows teams to gain consensus on who will be involved in the initiative and it creates accountability over one’s role in the team.
- This can also give an indication of where there may be gaps in the roles and skills required for that team.

Once you have conveyed this information on RACI to a team lead/champion, they are to share it back with their team and assign roles.

- **Assign roles early** in the set-up of a new team/project and when **many Thrivers are present** in a team meeting.
- **Update RACIs** over time, as teams change. Ask members to contribute to specific roles.
- **Members can volunteer** for whichever part of RACI they want to undertake.
- Team leads should ask who will take up the role of **C’s and I’s first** and then R’s and A’s.

Please note:

- ***C’s and I’s*** *may have whole teams like #social-media, #multimedia.* Only have 1 person for A. Avoid having @Morris here as a placeholder.
- **Avoid names** being allocated to multiple roles.
- **The attendance of C’s and I’s in meetings may depend on meeting agendas.** If you want their input when creating a plan, brainstorming or decision-making, then that is where you would encourage them to participate.
- **Generally C’s, R’s, and A’s are most active in the team.** This is to ensure that there is fair representation in the decisions made by the team.

See here for the most up to date Copy of RACI List as of **May 2023**.

General Communication

- Acknowledge messages in the #assistants or #teambuilders channels by replying or reacting to them so that team members are aware that you’ve read them.

Slack FAQs

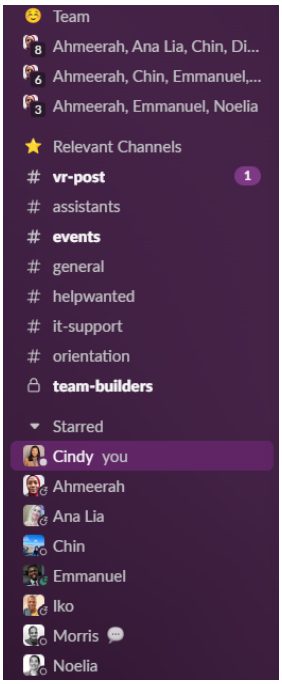
Which channels do I join? There's so many of them! 😵

The short answer: all of the active ones that hold meetings on a regular basis.

As a Team Assistant (TA), it's recommended that you also join also admin channels like #it-support, #help-wanted, #induction, #induction-coordination, #trainers, etc. unlike other roles who would only be involved with much less channels. For e.g. a content creator would be involved with #social-media or #researchers related channels.

Do I check all of the notifications everyday?

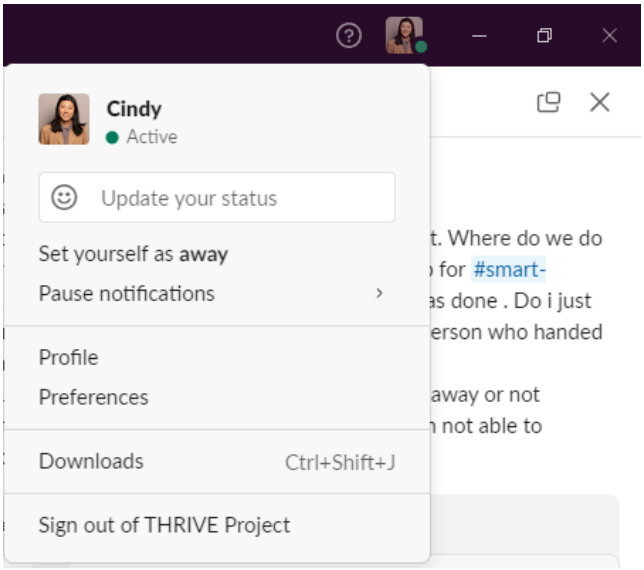
No. As you settle into THRIVE, you'll figure out which ones are relevant to you and how often to check them. Ask a fellow Team Assistant about which channels might be relevant. It might look similar to this:



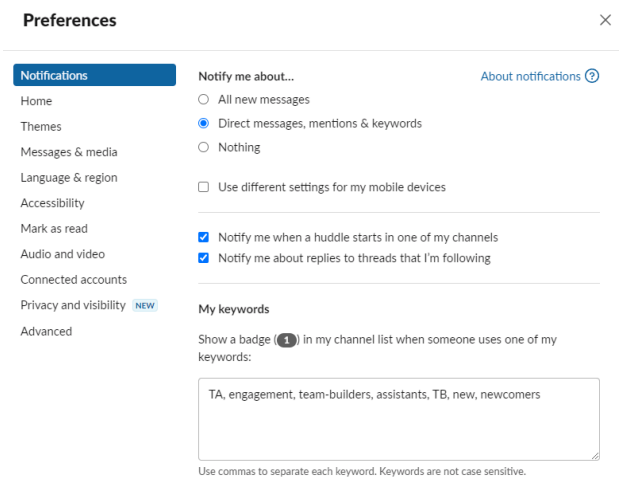
As a Team Assistant, the teams you should join include:

- #trainers, #vr-post, #announcements, #assistants, #events, #general, #helpwanted, #induction, #induction-coordination, #it-support, #orientation, #_teambuilders [PRIVATE]

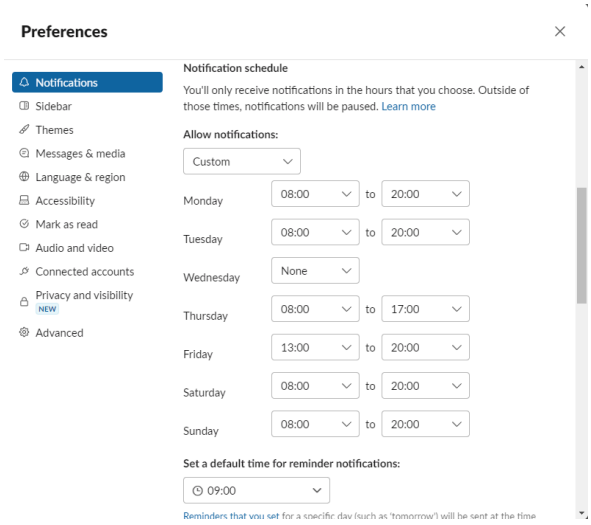
Another helpful tool is going to the Notifications setting and adjusting your **Preferences**.



Keywords you might want to include such as TA, assistants, TB, team builder, newcomer, orientation, etc.



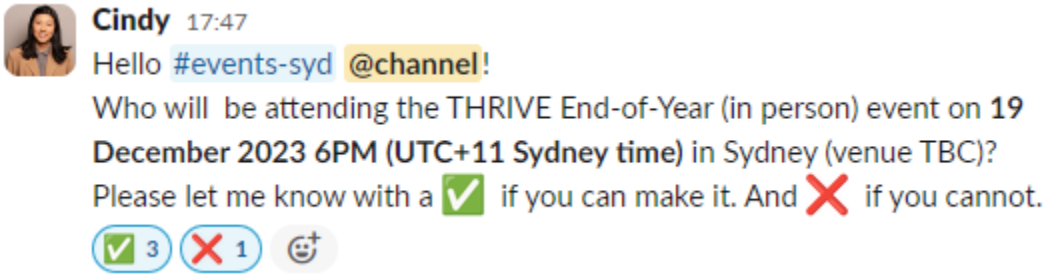
Notification schedule to mute notifications when you're not available.



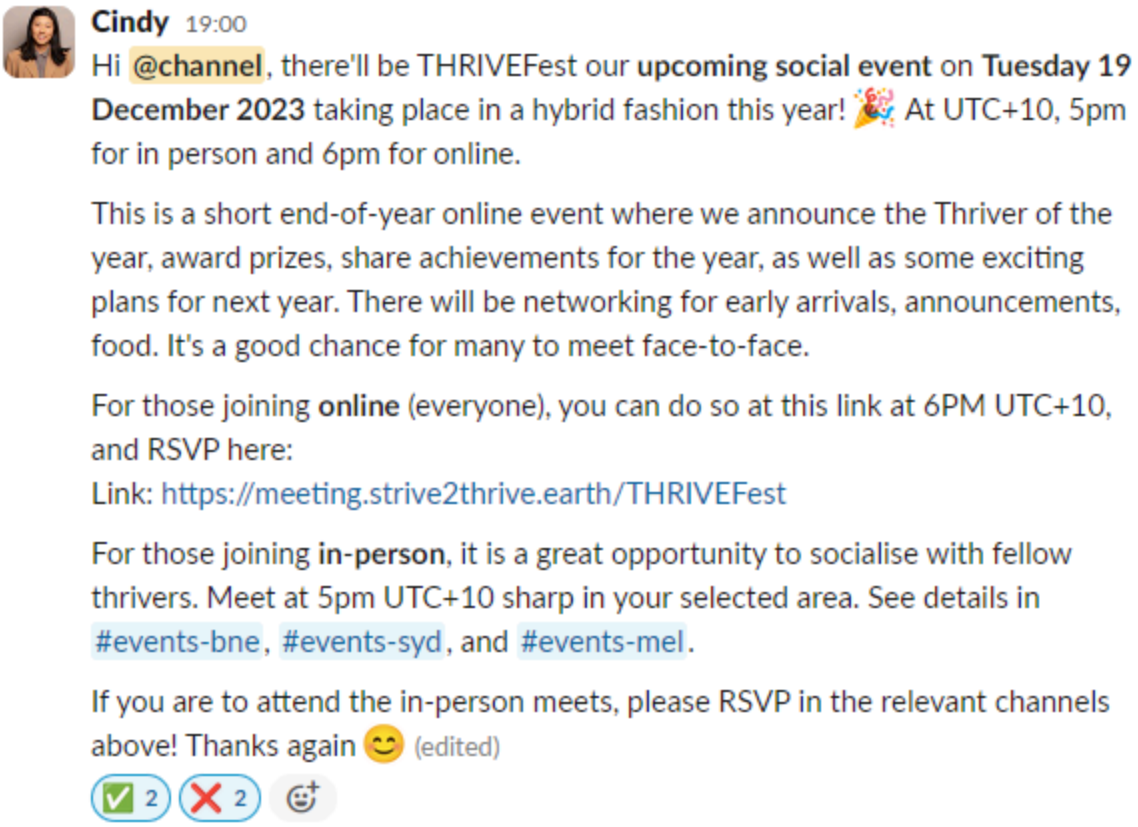
Organising Events

You may be tasked with the coordinating events in #event-syd, #events-mel, and #events-bne. THRIVEFest is one example. Here are the general steps:

1. Post an invite and RSVP request in the channel.



2. Post an announcement of the event in #general



3. Give it about one week before asking those who RSVP if they have a preferred location for the meetup. One with fast and good wifi.
4. Announce the venue/location in the event channels.

Version Control Information

@Name	Version number	Update	Reason	Date
@Annabelle	**v1.0**	First version of the guide	Guidelines from Team assistants and builders	30/01/2023
@Annabelle	**v2.0**	Added new information due to change in process	To be consistent with the updated process	22/05/2023
@Annabelle	**v3.0**	Added new information due to change in process	To be consistent with the updated process	29/05/2023
@Annabelle	**v3.1**	Formatting changes	n/a	12/06/2023
@Cindy	**v3.2**	Formatting/text changes	n/a	27/09/2023
@Cindy	**v3.3**	Formatting/text changes	n/a	06/10/2023
@Cindy	**v3.4**	Formatting/text changes	n/a	29/10/2023
@Cindy	**v3.5**	Formatting/text changes	n/a	08/11/2023
@Cindy	**v3.6**	Updated links/ formatting changes	n/a	30/11/2023
@Cindy	**v3.7**	Formatting changes	n/a	10/01/2024
@Cindy	**v3.8**	Added more information to existing sections	To better explain the process	18/03/2024
@Cindy	**v4.0**	Added new information due to change in process	To be consistent with the updated process	10/06/2024

@Thandie	**v4.1**	Added Resources and Version Control tabs	Consistency with updated document template.	07/07/2024
@Justin	**v4.2**	Formatting changes and new information added.	Observed discrepancy between PDF version and Google Docs version.	31/08/2025
@Justin	**v4.3**	Added new resource which @Abhi made - the “How To Use THRIVE Event Scheduler and Daily Diaries” guide.	Guide adds missing information - too big to fit into this guide directly.	29/10/2025