

Briefing and handover

Briefings and handovers are crucial to the continuity of projects, and to ensuring the effectiveness of your team.

Whilst a **briefing** covers essential information on policies, procedures, broader context and job requirements, a **handover** focuses on continuity of work and passing on the day-to-day experience of the role.

“The worst scenario is being dropped in with no handover at all and receiving just rumours and opinions and at best a whistle stop tour”. Richard Lorenz, Aid Workers Forum

Briefing

Every incoming post holder can benefit from a briefing covering:

Physical orientation:

Where do I find people, resources, information? Where do I eat and sleep?

Organisational orientation:

Where do I fit into this organisation? What are the values and objectives of this organisation?

Health & Safety:

What are the safety and security procedures and concerns? Up-to-date information on environmental and role risks and ways to mitigate these.

Terms and Conditions:

How will I be paid? What am I entitled to? What do I do if I have a problem?

Country orientation:

Background to the country and region. Nature and extent of the disaster, maps and plans.

Programme orientation:

What are the aims, objectives and deliverables; the funding; the progress; the challenges of this programme? What policies and procedures are used?

Job requirements:

What are my objectives and timescales? How will my performance be reviewed and evaluated? How does my role fit with others in the team?

Pre-departure briefing is often organised by headquarters, but a short telephone briefing from the field is helpful. A full briefing on arrival is essential.

Handover

The single most important source of information will be the job's predecessor. Failure to plan and organise handovers reduces programme effectiveness.

- one hour at the airport is not enough but better than nothing
- one week working together would be ideal as it would allow introductions to staff and partners

If a face to face (or skype) debriefing is not possible then short, written handover notes and well-ordered files are the absolute minimum.

In preparing a handover consider:

Current status of programmes:

Finances and resources; plans and priorities; risks and contingencies; partners and key contacts with phone numbers, email and addresses.

Brief history to date:

Achievements, changes and lessons learnt difficulties and constraints.

Priorities in coming weeks:

- day-to-day activities, and regular commitments and contacts
- any ad hoc, one-off events
- ongoing projects, supplies etc.
- any special duties e.g. chairing meetings

General: ways of working; best sources of information; living advice e.g. how and where to relax!

Start compiling handover notes a few weeks before you leave, noting issues which may arise in the future, then add detail in your final few days.



Using the All In Diary as a handover tool

Recording notes and information provides a ready-made handover tool for your successor.

This can assist continuity, particularly in the early stages of disaster response.

Notes could include:

- Useful contacts
- Constraints and successful approaches to working in the local context
- Key decisions made in developing your project
- Key learning from activities to date
- Security, staff and logistical issues
- Meetings held and key outcomes
- Urgent follow-ups and outstanding challenges
- General observations and suggestions
- Local working hours, holidays and seasonal activities
- Cultural considerations
- Local facilities

Additional resources on All In Diary website

Induction, Briefing and Handover Guidelines © 2008 People In Aid
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Web links for further information

<http://chsalliance.org>