

Free one-task handover kit

Pass the Job On | Robert W. Linn, PM

Pass one task on clearly, without an endless promise to stay on call. This handout stands alone. No purchase is needed. A task handover does not appoint someone to a lodge role.

Check permission first

Who may approve the role change? Who may receive each item or record?
Who grants access?

If unknown, ask the proper lodge lead. Do not share restricted items while waiting.

Filled example: made-up meal setup

Lee confirms Sam ends June 30 and Pat starts July 1. Next task: six tables ready July 8 by six. Cooking and cleanup are outside this role.

June 24: tried and still open

Lee approved supervised practice with a printed list. Pat counted supplies, found missing napkins, and told Lee. Full setup is untried; Lee will check the room by June 26.

Planned transfer and finish

Pat will receive the supply box and test his own folder access July 1. The account manager will grant access. Sam offers one ten-minute call July 9 at six. After that, Pat uses Lee's normal help route.

First step: name one task and the next checked date. Write "unknown" if needed. A missing helper is a gap to report, not a lifetime duty for the last brother.

My one-task handover plan

Use page 1 as the model. Mark future entries “planned”; update after each check. Keep passwords and private records off this page.

Keep answers short. Check every word before printing. Use an extra sheet labeled with this page and box if needed.

1. Task, approved role change, start and end dates

2. Next due task, source of the date, and limits of the role

3. Items, records, access: person who received it, approval, and date

4. Trial date: what was tried, result, and what is still untried?

5. Open checks: who and when? Help ends when? Next contact?

After checking, add a date and ready / partly ready / not ready beside each part. Keep failed checks open. This plan does not grant approval.

A ten-minute safe handover practice

Before you begin

Choose one safe task both people are allowed to do. Use real approved supplies or a safe practice case. No heavy lifting, purchases, restricted records, or live account changes for a practice exercise.

Example task

Find the labeled supply box. Count six sets. Compare with the approved list. If short, stop and tell the proper lead; do not buy extra stock without approval.

0–2 minutes: name the result

Say: “Let us try just this step. What result do we need? When do we stop and ask?”

2–4 minutes: show it

One person shows the task and explains the key steps. The other may ask questions or choose to watch.

4–8 minutes: try it

The receiving person tries the safe task. Stop unsafe steps. Notice where the note needs a change. Alone, read the steps aloud and mark what you cannot check.

8–10 minutes: record the gap

Say: “What could you do? What has not been tried? What must be checked next?” In a class, use pairs and made-up facts; no one must share a real problem.

Write what actually happened on page 2. The June 24 example on page 1 shows how to leave untried work open.

A practice proves only what was tried. Check one real task safely with proper access and training before treating that task as ready.

Words for gaps and a clear finish

No next person

“The job is still open. This task is due Friday. I cannot continue after the agreed end.

Who can approve a safe short-term plan?” Follow the proper role-change route; do not promise work you cannot do.

No last person

“I do not have the old notes. Which approved records may I use? Who can confirm the next deadline?” Do not press a sick brother or seek his passwords.

Only part is ready

“The supplies are counted. Access has not been tested. Who will check it, and by when?” No willing person means an open gap to report.

Set an end

“I can offer one ten-minute call Thursday at six. After that, use the normal help contact.” A new request needs a new agreement.

Before you close

Check the actual role change, received items, approved record location, tested access, safe trial, open gaps, and end of support. Check who received each item. Before old access ends, have the account manager check new access and recovery work. Keep only work facts.

For five separate worksheets and meeting tools, see Pass the Job On at brotherhoodofpurpose.com. Copying this tool gives no right to share restricted records.

Share this complete handout at no charge with credit. Adapt for lodge use and label changes. You still belong when you leave a job.
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