



GRETNA JUNCTION

CROWNTHRIVE, LLC / DIGITAL COLLECTION

COMMUNITY & EVENTS

The Volunteer Shift and Handoff Kit



Give each shift a clear job, a responsible lead and a useful handoff.

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FREE PLANNING PACK

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JUNCTION COMMUNITY TOOLS

The Volunteer Shift and Handoff Kit

Give each shift a clear job, a responsible lead and a useful handoff.

Prepare a repeatable shift plan and handoff record. This kit does not replace screening, training, safeguarding, permissions or an organization's procedures.

START HERE

1. Define the actual role and the person supervising it.
2. Ask for availability; do not assume acceptance.
3. Confirm each shift and explain its limits.
4. Record unfinished tasks for the next responsible lead.

Time to begin: 30 minutes for the first rota; a few minutes at each handoff.

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Included: six planning sections, four printable worksheet sets, eight editable CSV files, an offline HTML workbook, license and file manifest.

Print this PDF to write on the sheets. It has no fillable fields. Edit the CSVs in your own spreadsheet app; they contain no formulas. Keep completed copies privately.

THE PRACTICAL GUIDE

1. Define the role before filling the rota

Describe the task, location, planned time and responsible lead. State what the volunteer may do and what must be referred to someone else. A clear role is more useful than 'help as needed' when a new person arrives.

Use the organization's actual requirements for screening, training, access and supervision. Mark a dependency unresolved until it is complete. This kit is for adult coordination and does not authorize work with children, vulnerable people, money or other protected activities.

2. Ask for availability and confirm agreement

Give adults a clear way to state when they are available and to decline a shift. Record only the information needed to arrange the work. Use a minimal name or local reference in shared copies and keep personal contact details with the coordinator.

Separate available, invited, accepted and confirmed. A name entered on a rota does not mean the person agreed. If availability changes, update the assignment and notify the relevant lead through the organization's usual process.

THE PRACTICAL GUIDE

3. Prepare a short shift brief

Before the shift, explain the goal, assigned tasks, materials and handoff time. Identify who can answer a question and which actions require permission. Confirm actual access arrangements and the organization's procedures for concerns or emergencies.

Ask the volunteer to identify anything unclear before work begins. Do not treat a signed sheet as proof that training was effective or that every condition is safe. The brief records the arrangement; the responsible organization must manage the actual activity.

4. Track materials without collecting unnecessary details

List shared items by a simple label and note who received them, their condition and expected return. Keep keys, security codes and sensitive access details outside a general rota. Use the responsible organization's controls for restricted equipment.

At the end of a shift, record what was returned and any question that needs a lead's attention. Do not ask volunteers to resolve an equipment concern beyond their role. A count in the log is a record to check, not an audit certification.

THE PRACTICAL GUIDE

5. Hand off facts and unfinished work

Use a short handoff: what was completed, what remains and who owns the next step. Record the time and receiving role. Avoid private stories about participants or unsupported judgments about another volunteer.

A concern involving sensitive information belongs in the organization's appropriate reporting route. In the general handoff, record only that the responsible lead was contacted if necessary. Do not put health information, allegations or identification records in the shared worksheet.

6. Review the pattern and appreciate the work

Compare planned and actually completed shifts. Look for recurring gaps, unclear roles or supply problems. Ask volunteers what would make the next shift easier and make participation in feedback optional.

Thank people for the work they actually did. Obtain permission before publishing names, images or personal stories. Keep recognition separate from claims of certification, employment status or platform rewards. Revise the next rota using the real availability and lessons recorded.

WORKSHEET 1 OF 4

Availability and confirmed shifts

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Shift / task	Setup 9-10 (fictional)
Volunteer reference	Volunteer A
Availability / invitation	Available; invited
Actual acceptance	Awaiting confirmation
Lead / backup	Coordinator; confirm backup

YOUR PRIVATE WORKING COPY

Shift / task	Volunteer reference	Availability / invitation	Actual acceptance	Lead / backup

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

WORKSHEET 2 OF 4

Role and shift brief

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Role / goal	Welcome desk (fictional)
Agreed tasks	Direct adults to the named room
Limits / permission needed	Refer private questions to lead
Responsible lead	Coordinator
Brief confirmed	Not yet briefed

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Role / goal	Agreed tasks	Limits / permission needed	Responsible lead	Brief confirmed

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

WORKSHEET 3 OF 4

Shared materials issue and return log

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Item label / quantity	Sign set / 3 (fictional)
Issued to / time	Shift lead; example time
Condition noted	Check before issue
Expected return	At closing handoff
Actual return / concern	Not issued

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Item label / quantity	Issued to / time	Condition noted	Expected return	Actual return / concern

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

WORKSHEET 4 OF 4

Shift completion and handoff

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Shift / date	Example morning shift (fictional)
Completed work	Room signs prepared
Unfinished task	Confirm final room assignment
Next owner / due	Coordinator before opening
Received by / time	Not yet handed off

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Shift / date	Completed work	Unfinished task	Next owner / due	Received by / time

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

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