



# Temporary Role Transition Guide



Government  
of South Australia

SA Health

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# 1. Introduction

## **Purpose**

The purpose of this guide is to provide a checklist and information for managers and individual employees to support a smooth transitioning to temporary roles. Responding to COVID-19 has meant that we are faced with uncertainty and that we are needing CALHN employees to be flexible and to step into essential roles as required. This may mean stepping out of a team or work area that the employee is used to operating in and moving to be in another team or work area.

We know that change like this can be difficult to navigate. Employees may experience a range of emotions when making this transition and managers, already busy may overlook some key steps that will set this up for success.

We want to put resources in the hands of managers and employees so that they can successfully prepare to navigate this change with as little impact as possible. This will mean a smoother transition for the work areas and the individuals impacted. When executed well, it can be an opportunity to enhance engagement and development of CALHN team members, as well as benefiting work areas through achieving increased productivity more quickly.

## **How to use this guide**

The guide is split into two sections. The first is a checklist to prompt managers to ensure that all the elements have been put in place to enable an employee to transition to the work area. Managers preparing to receive new team members to their work areas can use this section and ensure they have planned for and completed all the steps. This is in a simple to use one-page format.

The second section is for employees. We have designed this part of the guide to assist you to prepare for the change to your role and to be able to think through what you need to successfully transition to a new role or work area. This guide will walk you through a series of questions and brief activities to assist you to clarify your thinking and to plan for a successful transition to your new role and work area.

Select the relevant part of this guide and follow the steps.

## 2. Manager Checklist

Managers play a key role in the performance and productivity of their team members. Research shows that by setting clear expectations, giving feedback and coaching and taking an active interest to support employees has a significant positive impact on engagement.

One of the critical times an employee's engagement and performance can be impacted is through times of change such as moving to a new role or joining a new team/work area. Managers can assist to smooth the way by taking steps to actively plan and complete the following:

### Steps to Complete Prior to Team Member joining:

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1. Ensure a suitable work area is available 
  2. Ensure that access to required systems is in place (IT systems, phone, security access, etc.) 
  3. Have a copy of the job description and ensure you are clear on role expectations. 
  4. Communicate the change to existing team members (so people know what is happening). This could be an email or a mention at a team meeting. 
  5. Identify someone who could be a suitable 'buddy' for the new starter to help show them around and get them settled into their role. 

Should you need any further detail on the steps above, you may find it useful to refer to the [Induction Checklist](#).

### Steps to Complete Day 1 and Week 1 of new team member joining:

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1. Welcome the person and introduce them to the team and their buddy 
  2. You (or their buddy) show them around the work area and their work place. 
  3. Arrange to meet one on one on their first day to give them a copy of the job description and ensure clarity on expectations. 
  4. Check in at the start and the end of the week. How are they going? Do they have any questions? Is there any support they need? 
  5. If there are any team interactions like huddles or team meetings – take a moment to welcome the person and ensure introductions are made. 

## **2.1 Identifying a Suitable Buddy**

When considering a suitable buddy to assist someone to onboard to a role or work area it is good to consider someone with the following characteristics:

- A good knowledge of the work area and the team – can confidently show someone around and answer general questions
- Someone who is approachable and can help put people at ease
- Someone who is positive about the work area and role – can set the right tone at the outset
- Someone who you have spoken with and is willing to take on the task

### 3. Employee Transition Worksheet

It is quite common to be experiencing a range of emotions and thoughts about moving to a new role or work area when it is not something you have expected or planned for. You may be feeling excited about the opportunity to take on something new or you may feel apprehensive or fearful that you may not be able to be successful in that role. It may be a combination of all of these. It can be very helpful to take a few minutes to think about and plan for the transition to assist you to make it as smooth as possible.

Please note that this is confidential and for your own self-reflection. There is no expectation that you share this with anyone else. It may be helpful to use this as a guide for a conversation with your manager in your new work area, particularly regarding any support you may require.

#### Step 1 – Take stock of your current thoughts and emotions about the transition

Take a moment to write down your thoughts and emotions in each of the boxes below. It can be helpful to separate how you are thinking and feeling and to clearly capture this down rather than have it all in your head.

**What I think about the role transition:**

**How I feel about the role transition:**

#### Step 2 – Identifying your skills and what you might need

Now that you are clear on your thoughts and your emotions it is helpful to think about the role. What information do you have at hand about the role? If you have a job description or some understanding of the role take a moment to think about what skills and experiences you can bring to the role. What are your transferrable skills? You may be surprised how many skills you have that you can use in the role you are transitioning to.

**What are the transferrable skills I have and can make use of?**

Hopefully from the previous step you have identified many skills and experiences you can draw on to assist you to navigate this change well. It may have also started you thinking about any gaps or areas of development you may need to be successful in this role. This does not need to be formal training as such but there may be a few ideas you have about what you could learn from this role and what you might need to be effective. Take a moment to capture these thoughts below:

**What do you hope to learn from this role and this experience?**

**Is there any support you need to be successful or to smooth the transition?**

#### **Step 4 - Work out Your Plan**

Given the above thinking take a few moments to capture your next steps or your short-term action plan to set yourself up for success. What can you do to make sure you have the support you need?

One of the first steps we suggest is to connect with the manager of the work area to ensure you are clear on expectations and the role and that you can share your thoughts above and ensure support for whatever you need to make the transition successful.

#### **Action Plan:**

- 1.
- 2.
- 3.
- 4.

Great work! You have finished and have a clear plan of the steps you can take to ensure you transition smoothly into this role. We encourage you to make the most of the opportunity and learn what you can from the experience.

Should you require any further assistance please speak with your manager in the first instance or reach out the Workforce team or the Wellbeing committee.