
MWR MANAGERS' OPERATIONS GUIDE

Accomplish New Manager Turn-Over Activities



DO THIS TASK WHEN

- You are transferred from one FFR supervisor/manager position to another that has duties and responsibilities different from your present position/assignment.
- You are newly hired/promoted into an FFR supervisor/manager position.
- You are assigned/detailed as temporary/emergency relief into an FFR supervisor/manager position that has duties and responsibilities different from your current position/assignment.
- You are being relieved by a new supervisor/manager.

REFERENCES

- CNICINST 1710.3, Operation of Morale, Welfare, and Recreation MWR Programs.
- CNICINST 5300.2, Non-Appropriated Fund Personnel Manual for Nonappropriated Fund Instrumentality (NAFI) Employees.
- Local policy directives on personnel management, staffing, indoc, and position management.
- DODI 7000.14-R, Department of Defense Financial Management Regulations.

**SUPPLIES/
RESOURCES**

- Up-to-date standard operating procedures (SOPs) relative to your FFR Program.
- Up-to-date local Command instructions relative to your Program.
- Up-to-date system instructions relative to your Program.
- Applicable keys, passwords, combinations.
- Appropriate letters of authorization.
- Current inventory/list of supplies and equipment.
- Up-to-date position descriptions for your staff.
- Pass-down logs and/or local desk references, if any.
- Time and appointment scheduling tool or similar networking and things-to-do devices/lists/ methods.
- Local area, base, and FFR Department information packages, flyers, brochures, booklets, etc.
- FFR Department, Human Resources handout, Standards of Conduct.
- Staff payroll data, if your position requires payroll and incentive/bonus management.
- Any contract or excerpts of contracts relative to your new position or area of responsibility.
- Current program activity/event calendar(s).
- Current/recent program needs and competition assessment information/data.

**SUPPLIES/
RESOURCES
(cont.)**

- Copies of past staff work schedules.
 - Copies/excerpts of local labor agreements, if any.
 - Up-to-date customer usage data.
 - Financial records for the current period and past two years.
 - Up-to-date personnel list.
 - Copies of the Command and FFR Department's mission, vision, goals, and guiding principles, if any.
 - Copies of the FFR Department's and Program's short/long-term plans, if any.
 - Recent procurement records.
 - Equipment, clothing, identification badges, cards, tags applicable to your position.
 - Typical office supplies.
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**THIS TASK
IS DONE
CORRECTLY
WHEN**

- You have completed all the check-in/indoctrination procedures required by your FFR Department, Command, and the applicable check-in/indoctrination steps listed in this task, which include:
 - Getting letters of authority, certifications, and licenses to accomplish the responsibilities of your position.
 - A review of your Program's areas, equipment, and supplies.
 - A review and discussion of the past history of your Program's staff, operations, finances, supplies, equipment, facilities, procedures, activities/events, products/services, projects, and its customers.
 - Getting copies of all applicable instructions and SOPs necessary to accomplish the responsibilities of your position.
 - Beginning development of (or addition to) a professional network of on-base and off-base, points-of-contact (POCs), vendors, peers/colleagues, staff, tutors, and mentors.
 - Discovering what your Program has, where everything is located, what projects are pending, what projects need to be initiated/finished, and what is on order or back-order.
 - Getting a list of the phone numbers and POCs necessary to accomplish the responsibilities of your position.

**THIS TASK
IS DONE
CORRECTLY
WHEN
(cont.)**

- Locating and examining all the hazardous materials (HAZMAT), HAZMAT storage, and the Material Safety Data Sheets (MSDS's) necessary to accomplish the responsibilities of your position.
 - Finding the HAZMAT usage and storage to be in compliance with applicable policy and instructions.
 - Locating and examining all the fire, safety, security, preventive medicine materials, and storage areas necessary to accomplish the responsibilities of your position. Finding these to be in compliance with applicable policy and instructions.
 - Meeting all your staff, your immediate supervisor, the FFR Director and all key POCs necessary to accomplish the responsibilities of your position.
 - Discussing local policies, traditions, histories, and organization culture with your immediate supervisor, the FFR Director, and your key staff and peers.
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NOTES

This task is one of acquiring and absorbing a great deal of information in a short period of time.

Hopefully, most of the steps in this task are included in your Command's and the FFR Department's check-in and indoctrination procedures.

You may be moving up within a Program with which you are completely familiar. If this is the case, review this task to determine if you need to accomplish any of its steps. Disregard any of the check-in and indoctrination items you have already accomplished or are scheduled to accomplish in the near-term.

You will find the first few weeks in a new supervisory/management position/assignment to be both hectic and confusing, no matter how well organized the Command's/Department's check-in and indoctrination processes. For sure, this is the time to apply the effective communication imperative: "listen 80% of the time..., then listen the other 20% of the time!" If there is any time left--ASK QUESTIONS. Make sure you are clear on everything.

You will have the entire rest of your time in this position/assignment to talk..., for now watch, inquire, and listen! Your success is nearly ensured when you transition from listening and learning to participative supervision/management.

An exception is if you have been placed in a bad situation to help salvage the Program, in which case, listen quickly, then get on with the business at hand! If you are in this situation, you were undoubtedly selected for your skill, knowledge, and experience.

During this initial check-in and indoctrination period you will be swamped with details. Effectively manage your time and the information presented.

**NOTES
(cont.)**

The check list in this task may seem a bit overwhelming, but remember, accomplish these over-time -- it's in your best interest to balance *speed* with *quality*. (e.g., 30-60 days is a reasonable goal—3-days isn't!)

You may want to cover everything, and probably should; just do it well. And a final suggestion - cover these items when you need them vice all at once or in the order provided in the checklist!

Whenever possible, accomplish these steps with the incumbent supervisor/manager!

If it is you who is being relieved and if you have the good fortune of having "overlap" time, use this Task to assist your relief in an efficient and thorough turn-over.

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PROCEDURE

Step 1 Complete all applicable check-in procedures specified by the following.

- ☐ Your immediate supervisor.
- ☐ The FFR Director/Deputy/Site Manager.
- ☐ NAF Personnel or Human Resources Office (HRO).
- ☐ The Command, if applicable.

Step 2 If you are new to the area/Command, accomplish your personal needs as you begin your new position/assignment turn-over steps.

These may include:

- Moving.
- Locating temporary or permanent housing.
- Receiving delivery of personal property into a new residence.
- Scheduling electrical, water, and sewage hook-ups.
- Starting trash, garbage, and recycling collection.
- Starting mail, e-mail/internet connections, and changing addresses.
- Starting newspaper(s), magazines, and cable TV service.
- Arranging child care.
- Accomplishing school registrations/transfers.
- Taking care of house/yard care/maintenance/renovation.
- Transferring church membership records.
- Transferring fraternal organization membership records.
- Accommodating special medical requirements.
- Locating veterinary care facilities.
- Locating shopping facilities.
- Establishing new physician and dental care providers.
- Establishing new banking and investment services.
- Establishing new legal, financial, and insurance services.
- Establishing new personal services, (gym, hair care, car care, etc.).
- Identifying recreation and leisure opportunities.
- Accommodating new/different transportation needs.
- Changing driver's licenses, vehicle/boat/plane registrations/tags.
- Changing vehicle, boat, trailer, airplane titles.
- Registering to vote.
- Obtaining applicable business licenses.

Step 3 Accomplish the following turn-over activities that you have **NOT** already accomplished (or are scheduled to accomplish) by Step 1.

This check list continues on following pages.

NEW FFR PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST
ACCESS & AUTHORITY
<input type="checkbox"/> Do you have necessary keys and/or lock combinations to access all areas necessary to accomplish the responsibilities of your position?
<input type="checkbox"/> Do you have passwords to access your authorized computer system(s) or system areas?
<input type="checkbox"/> Have you changed the initial "start-up/log-in" password to one only you know? Be sure to comply with local ADP/security guidance regarding use of computer systems, networks, e-mail, and computer peripherals.
<input type="checkbox"/> Do you have personal copies of the FFR SOPs necessary to accomplish the responsibilities of your position?
<input type="checkbox"/> Do you have letters of authorization necessary to accomplish the responsibilities of your position?
PERSONNEL
<input type="checkbox"/> If required by your position, have you been processed for or have an up-to-date health card?
<input type="checkbox"/> If required by your position, have you been processed for or have an up-to-date National Agency or other security check?
<input type="checkbox"/> If required by the base or Department, do you have an up-to-date ID Card?
<input type="checkbox"/> If required by the base or Department, do you have up-to-date base vehicle stickers for each vehicle you and your family use on the base?
<input type="checkbox"/> Do you have an up-to-date list of personnel?
<input type="checkbox"/> Do you have an Individual Development Plan (IDP)?
<input type="checkbox"/> Have you been briefed and provided written guidance explaining how to conduct recruitment for new/replacement FFR staff? How and when to prepare and submit SF-52's or local forms? How and when to announce/advertise and interview? How selected and non-selected applicants are notified? How widely or restricted your typical announcements are disseminated and by what media? (See <u>Announce/Fill NAF Position Vacancies.</u>)

Continued on next page.

NEW FFR PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

PERSONNEL, cont.

- ☐ Have you received all applicable special equipment, clothing, identification badges, cards, tags applicable to your position.
- ☐ Have you reviewed your staff's personnel and training records?
- ☐ Have you received a list of authorized and vacant APF and NAF billets?

ORGANIZATIONAL CHECK-IN ITEMS

- ☐ Have you met and received initial briefings from:
 - ☐ Your immediate supervisor?
 - ☐ Installation or region FFR Director?
 - ☐ FFR Deputy, if any?
 - ☐ Command Master Chief (CMC)?
 - ☐ Executive Officer (XO)?
 - ☐ Commanding Officer (CO)?
 - ☐ Public Works or FFR Maintenance?
 - ☐ Others as specified by your immediate supervisor?
- (ASAP--meet, greet and get acquainted with your staff! See Step 12.)
- ☐ Have you toured the base, the FFR Department, and your FFR Program facility?
 - ☐ Have you participated in a briefing about the overall vision, mission, and guiding principles of the FFR Department and your Program, business or office?
 - ☐ Do you have a copy of the FFR Department and your Program's goals and objectives and short/long-range plans?
 - ☐ Do you have a copy of the FFR Department and your Program's organization charts?
 - ☐ Have you received a general briefing of DO's and DON'Ts from your immediate supervisor, the FFR Director, and your colleagues and peers?
 - ☐ Have you received an overview briefing of the FFR Department's and FFR Program's history, staff structure and Program organization from your immediate supervisor and/or the FFR Director?
 - ☐ Do you have a copy/copies of the base, FFR Department, and Program phone and address lists?
 - ☐ If you will be an authorized purchasing agent, have you received contracting training and contracting warrant?

Continued on next page.

NEW FFR PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

ORGANIZATIONAL CHECK-IN ITEMS, cont.

- ☐ If you will be an authorized NAF purchase card user, have you received NAF Purchase Card training, a copy of the purchase card SOP, and your NAF purchase card?
- ☐ Have you received a briefing of the FFR Program's contract services from your immediate supervisor and/or the FFR Director?
 - Maintenance • Janitorial • Other
- ☐ Do you have copies of, or access to all base and higher authority instructions necessary to accomplish the responsibilities of your position?
- ☐ Have you completed a site inspection and signed for all your Program's spaces, equipment, FF&E, machinery, vehicles and minor property with your immediate supervisor and applicable Program/department staff members? Have you conducted both a NAF fixed asset inventory and an APF property inventory?
- ☐ Have you completed a physical (item-by-item) inventory and signed for of all your resale and program supplies, and minor property with your immediate supervisor and applicable Program/department staff members?
- ☐ Have you worked with your immediate supervisor and others as applicable to investigate, analyze and report significant discrepancies in any of these turn-over inventories? (Refer to Ensure Proper Disposal of NAF/APF Property, Equipment and Vehicles and Ensure Proper Disposal of Lost/Stolen Property, Equipment, or Vehicles.)
- ☐ Have you ensured that the subsidiary ledgers are reconciled to the General Ledger account balances (or your Property & Depreciation Records/system print-outs)?
- ☐ Have you verified and signed for the petty cash and change funds?
- ☐ Have you completed, signed, and returned a Financial Disclosure Statement applicable to your position?
- ☐ Have you received a list of accounts receivable for your Program as of the close of the most recent financial period, indicating status of action being taken to collect receivables more than two months old?
- ☐ Have you reviewed any vendor/payment disputes/disagreements?
- ☐ Have you reviewed the list and status of pending Public Works requests?
- ☐ Have you reviewed the list, status, and documentation of pending, major and minor construction projects?

Continued on next page.

NEW FFR PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

ORGANIZATIONAL CHECK-IN ITEMS, cont.

- ☐ Have you received "the word" and investigated any unmet promises that have been made to your customers and/or staff members?
- ☐ Do you have copies of the most recent month financial statements with copies of the same month last year?
- ☐ Do you have documentation of the proposed capital improvement plans?

STANDARDIZED PROCEDURES

- ☐ Have you received a complete demonstration, briefing and check-out/certification on each of the following procedures that are relative to the responsibilities of your position?
 - ☐ Opening/closing.
 - ☐ Point-of-sale system.
 - ☐ Cash registers.
 - ☐ Communication systems. (Mail, e-mail, phones, fax, etc.)
 - ☐ SAP AIMS Planning and Reports profiles
 - ☐ Budget and monthly financial statement.
 - ☐ Safety/sanitation.
 - ☐ Payroll:
 - Time/attendance and time cards (system).
 - Work schedules and scheduling history.
 - Staff member meals.
 - Tips.
 - ☐ Tickets, coupons, and refunds.
 - ☐ Credit cards.
 - ☐ Security:
 - Alarm procedures.
 - Facility closing.
 - ☐ Use of facilities/equipment/vehicles.
 - ☐ Fees, prices and charges.
 - ☐ Purchase requests and purchase orders (POs).
 - ☐ Petty cash and change funds.
 - ☐ Interdepartmental transfers/charges.
 - ☐ SOPs and station Instructions.
 - ☐ Pass-down log.
 - ☐ Procedures for requesting assistance/work from support services and other FFR Programs.
 - ☐ Procedures for requesting assistance/work from other on-base and off-base Departments.
 - ☐ HAZMAT and operational safety.
 - ☐ Local forms.
 - ☐ Internal controls.
 - ☐ Disaster and emergency procedures and phone numbers. (e.g., robbery,

assault, fire, hurricane/tornado, snow/ice, injury, death, etc.)

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NEW FFR PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

MISCELLANEOUS

- ☐ Do you have a list of POCs and an up-to-date re-call/on-call list necessary to accomplish the responsibilities of your position?
- ☐ Have you been made aware of your "challenging" staff members as well as your "shining stars"?
- ☐ Do you have a list and status of taskings from the Region/Installation or Command that have not yet come to closure.
- ☐ Do you have a list of "hot button" issues or "pet" programs of interest to local Navy management?
- ☐ Do you have a list of the FFR Department's vehicles, their condition, where they are, who they are assigned to, and how they are checked out?
- ☐ Do you have copies of local forms necessary to accomplish the responsibilities of your position?
- ☐ Do you have copies of local labor agreements relative to your position and those that apply to your staff?
- ☐ Do you have copies of up-to-date position descriptions (PDs) for each of your staff members?
- ☐ Do you have a time and appointment scheduling tool or similar networking and things-to-do devices/lists/methods?
- ☐ Do you have copies of or access to the pass-down logs and/or local desk references or job aids, if any.
- ☐ Do you have copies of up-to-date supplies and equipment lists/inventories?
- ☐ Do you have copies of or access to:
 - ☐ Past staff work schedules
 - ☐ Staff payroll data, if your position requires payroll and incentive/bonus management.
 - ☐ Current program activity/event calendar(s).
 - ☐ Current/recent program needs and competition assessment information/data.
 - ☐ Customer/patron usage data.
 - ☐ Financial records for the current period and past two years.
 - ☐ Recent procurement records.
 - ☐ Latest audit reports.
 - ☐ Latest minutes from associated groups (e.g., advisory board, special interest groups, etc.)

Continued on next page.

NEW FFR PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

MISCELLANEOUS, cont.

- ☐ Program evaluations.
- ☐ Detailed activity plans and after-action reports, and lessons-learned files.
- ☐ Results of zone inspections.
- ☐ Pending discrepancies.
- ☐ Open purchase orders/obligated funds.

- ☐ Do you have the office supplies and equipment necessary to accomplish the responsibilities of your position?

- ☐ Have you reviewed the Uniform Funding Management (UFM) memorandum of understanding (MOU)?

TRAINING/CAREER DEVELOPMENT

- ☐ Have you received training (or are you scheduled to receive) training, demonstrations, briefings, and/or check-out/certification on the following?
 - ☐ Command indoc.
 - ☐ The filing system(s) used by your Program.
 - ☐ Training and developing staff members.
 - ☐ Program safety, sanitation and health risks.
 - ☐ Discipline.
 - ☐ C.A.R.E training, if applicable to your position.
 - ☐ E-mail, intranet, internet, and fax operations.
 - ☐ Equal Employment Opportunities (EEO), affirmative action, and ADA requirements.
 - ☐ Sexual harassment.
 - ☐ Cultural diversity.
 - ☐ Standards of conduct and government ethics.
 - ☐ Military and business protocol.
 - ☐ Cash handling and security.
 - ☐ Preparation and routing of Daily Activity Reports (DARs).
 - ☐ Computer operations and security.
 - ☐ Emergency procedures for your building(s) and area of responsibility.
 - ☐ Violence in the workplace.
 - ☐ Performance ratings/reviews for NAF and Civil Service staff members.
 - ☐ Program specific training (technical and professional).
- ☐ Other. _____

Step 4 At your earliest opportunity, discuss the past history of your Program's staff, operations, finances, supplies, equipment, facilities, procedures, activities/events, products/services, projects, and its customers with your immediate supervisor and your colleagues.

- What will keep you out of trouble?
- What will make you, your staff, and the Program..., extraordinary?
- Other than the obvious rank-has-its-privileges (RHIP) folks, who are your important customers?
- Who are your Program's opponents/critics?
- Who are your Program's advocates?
- Who are your principal gatekeepers and stakeholders?
- Are there any pending sensitive issues?
- Any open/pending audit/inspection findings.

Step 5 Get out and about!

- ☐ Don't wait for the base's major players to come to you. Take every opportunity to get out and meet the people. Meet the Program managers, department heads, Command Master Chief, Unit COs and CMCs, advisory board representatives, special interest group members/advisors, quality of life board members, ombudsman, security, safety, etc. Schmooze!
- ☐ Listen first! After you hear what their perceptions and opinions about what you are NOT doing/providing or SHOULD be doing/providing, ask each to describe what they value in the Program?
- ☐ Always under-promise and over-deliver. Record and carry out your promises!

NOTE: Repeat this process with each member of your staff, your colleagues, and your immediate supervisor.
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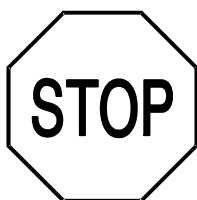
- Step 6** At your earliest opportunity, discuss local policies, traditions, histories, mores, norms, and culture with your immediate supervisor, the FFR Director, support services, business office, and your key tutors/mentors.
- Step 7** At your earliest opportunity, read all applicable instructions and SOPs necessary to accomplish the responsibilities of your position.
- Step 8** Prepare and maintain a professional network of on-base and off-base, POCs, vendors, peers/colleagues, staff and mentors.
- Step 9** Read and compare your copies of the base, FFR Department's and FFR Program's mission, vision, goals, and guiding principles, your Program's short/long-term plans, and its goals and objectives to ensure these *are* and *remain* aligned.
- Step 10** During the early stages of your turn-over activities, observe what your Program has, where everything is located, what projects are pending, what projects need to be initiated/finished, what is on order or back-order.
- Step 11** If applicable, locate and examine all the hazardous materials (HAZMAT), the Material Safety Data Sheets (MSDS's), and the HAZMAT storage for your Program.

Step 12 Immediately begin getting to know your staff members.

- First and family names.
- Important family dates.
- Interests and hobbies.
- What they find rewarding and satisfying.
- What they most like and dislike about the Program and their job.
- Their background and experience.
- What they see as incentives and motivational.
- Strengths, weaknesses and backgrounds.

Step 13 Accomplish all the above steps with each new staff member.

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| <p>NOTE:</p> | <ul style="list-style-type: none">• We suggest you prepare an SOP to institutionalize these steps for your new FFR Program staff members.• Share this procedure with your colleagues.• If one doesn't exist, encourage development of an FFR Department SOP applicable to all new FFR Department staff members.• Add any check-in/turn-over items that you discover during your initial indoctrination that we did not include. |
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Congratulations! You've completed this task.
