

Lochac Office Handover Checklist

v1.1 May, 2021 seneschal@lochac.sca.org

Work your way through this to get up to speed with your Office, especially if your predecessor hasn't had the opportunity to brief you.

- familiarise yourself with the Lochac Procedures Manual, the Code of Conduct, Kingdom Law and the Issue Resolution handbook**
These, and many other useful resources, are available from:
<https://seneschal.lochac.sca.org/resources>
- check your membership period;** renew as needed
- read through the handbook for your office** (if there is one)
see Regnum for links to those: <https://lochac.sca.org/regnum> (click on the office name)
or <https://seneschal.lochac.sca.org/resources/#officer>
- check that all documentation (digital or physical), archives, files and other assets have been handed over**
- get the passwords to access any resources or accounts you'll need**
Ask your predecessor and your Seneschal. This includes things like Xero and Dropbox for Reeves, where personal accounts will be need to be created at handover.
- start the process to ensure you have access to bank accounts**, where appropriate; and ensure that your predecessor's access is revoked
- introduce yourself to the relevant group/s**
Kingdom/Barony/Canton etc, using all appropriate communication channels (eg Announce, group email list, Facebook, Discord, newsletter)
- find out who your "uplines" are for reporting, introduce yourself**
Typically your Seneschal plus the Officer in the same role in your parent group
- identify reporting deadlines;**
see <https://seneschal.lochac.sca.org/reports/> - set early reminders as necessary
- set up your email address to receive Office-related emails**
Typically officename@yourgroup.lochac.sca.org - whether as a direct mailbox or aliased to forward to your own personal email address or to a shared account that gets handed on. If you need help with this, ask your Seneschal, Webwright, or failing all else Masonry.
- read through the past couple of Quarterly Reports or group minutes for your office**
Check for any related unfinished projects and also issues, ideas or successes
- talk to your Seneschal and former Officers to see what they think are the normal expectations for this office in this group, and what needs organising or improving**
This is especially important if you've taken up an abandoned or a brand new office, or if your predecessor is not responsive.
- appoint a drop-dead deputy;** consider and/or appoint other deputies
- ensure related regalia has been handed over;** check its condition or need for repairs

Additional Items for SCA Ltd Board or SCA NZ Committee Members

- **ask if there is a job description or other document describing your new role**
If there isn't one, ask "are you sure?", then consider creating one if there really is none.
- **familiarise yourself with meeting protocols**
e.g. how the agenda runs, how voting works
- **ensure appropriate access for joining meetings**
e.g. Zoom; reserve/confirm availability for scheduled meetings
- **familiarise yourself with the responsibility boundaries and interactions between SCA Ltd, SCANZ Inc, US BoD, Crown and Kingdom Seneschal**
See the precedence diagram, list and links on <https://seneschal.lochac.sca.org/laws-of-lochac/> and develop a clear understanding of the difference between governance and operations, including in-game and out-of-game hierarchies.