Lochac Office Handover Checklist

v1.2 Aug 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
Find these and many other useful resources at https://seneschal.lochac.sca.org/resources

check your membership expiry date in Registry, renew as needed.
After your appointment is confirmed, log in to Registry again and check you can see the *Officer functions* menu - then edit the *My own warrant* information so it's how you'd like it

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

ensure you are receiving Office-related emails ok
See *My own warrant* above. Typically your public address is office@group.lochac.sca.org. If you need help in this area, *do* ask your Seneschal, Webwright or Masonry without delay.

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.