



## Standard Operating Procedure (SOP) 24

# HANDOVER PROCEDURES

### General

1. A Handover Procedure is to be instituted in the following cases:
  - a. When a Executive position is changed, e.g., after an Annual General Meeting (AGM),
  - b. When an Executive member steps down and another member is to be elected (usually at a General meeting), or
  - c. When a Sub-branch splits from an existing Sub-branch to form a new Sub-branch
2. A full handover procedure must be conducted in any of the above cases as per Annex A.

### Handover after an AGM

3. A full handover procedure must be conducted within fourteen (14) days after Executive positions have been changed due to an Annual General Meeting (AGM),

### Handover after an Executive Vacancy

4. A full handover procedure must be conducted within fourteen (14) days after an Executive position has been changed due to a member vacating an Executive position.

### Handover Procedure prior to and during the Split in an Existing Subbranch

5. A full handover procedure must be conducted within fourteen (14) days after notification that a split (members starting a new Sub-branch) will occur in an existing Subbranch,
6. Any Executive member electing to leave an existing Sub-branch must advise that existing Sub-branch Executive of his/her intention at least fourteen (14) days prior to them leaving the Sub-branch.
7. Once the existing Sub-branch has been notified of an intending split, a handover procedure for any Executive position must be commenced, preferably within fourteen (14) days of the split occurring.

### Handover Proforma

8. The Handover Procedure Proforma must be completed together with the incumbent member (Annex A).
9. Once completed, the proforma must be handed endorsement by the Sub-Branch President.

**HANDOVER CERTIFICATE**

Date of Handover

Name of Member handing over

AKA:	Full Name:
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Position of Member Handing over

PRES	V/PRES	DEC	TREAS	SSM	QM	SSL

IF PRESIDENT	Have you briefed the incumbent on everything pertinent to the Sub-branch and the Club?	YES/NO
IF VICE PRESIDENT	Have you briefed the incumbent on everything pertinent to the Sub-Branch?	YES/NO
IF SECRETARY	Have you briefed and introduced the incumbent to the following:  SUB-BRANCHMINUTES ELECTRONIC  FILES (EMAILS ETC) DOCUMENTS  FILED AWAY HARD COPIES OF  DOCUMENTS	YES/NO
IF TREASURER	Have you briefed and introduced the incumbent to the following?  SUB-BRANCH BANK ACCOUNT HOLDINGS  SUB-BRANCH BOOKS OF ACCOUNTS  SUB-BRANCH CHEQUE BOOKS AND DEPOSIT BOOKS  ALL EXISTING SIGNATURIES  ANY EFT PROCESSES	YES/NO

IF SSM	Have you briefed the incumbent on everything pertinent to the Sub-branch and the Club?	YES/NO
IF QM	Have you briefed the incumbent on everything pertinent to the Sub-branch, including?  REGALIA ORDER FORM  CURRENT HOLDINGS OF REGALIA  SUB-BRANCH items on order	YES/NO
IF SIERRA SQUAD LEADER	Have you briefed the incumbent on everything pertinent to the Sub-branch?	YES/NO

THIS CERTIFICATE ONCE COMPLETED MUST BE PRESENTED TO THE SECRETARY OF THE SUB-BRANCH FOR DETERMINATION BY THE SUB-BRANCH EXECUTIVE.

OUTGOING MEMBER:	DATE
INCOMING MEMBER:	DATE