

# **How to run a successful branch (without really trying)**

## Seneschals Checklist

### Business Meetings (Curia, council, etc)

- Prepare agenda
- Facilitate meeting
- Collect monthly/quarterly reports from officers (Q reports cc'd to you, original to Principality Superior for that office. If in Barony, cc Baron and baroness)
- Review and sign bank statements
- Prepare and read words(a brief intro to the meeting, state of the branch, any new policy announcements, words from P Sen or K Sen)
- Sign any checks that need to go out(double check that check request forms are complete and photocopies of receipts are made)
- Receive copies of sign in sheets and minutes from previous meetings (originals with Chronicler or secretary)-Minutes are required.
- Sign meeting minutes (to be valid must have signature from Seneschal and Chronicler)
- Review and approve event bids-Final decision is the seneschals
- Review monthly event reports
- Assign deputies and acting officers as needed
- Advertise open offices
- Copy of Customary to new officers-include job description
- Reserve meeting site, sign contract if needed
- Consult council as needed for decisions
- Educate officers in appropriate corporate policies, grievance procedure etc.
- Ensure Change of officer forms, Event information forms, date reservation are filled out and signed with photocopies of form, Membership card and ID

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- Receive and review final event reports-copy to exchequer

### Monthly Duties

- Check email 3x week(more as needed)
- Return correspondence within 72 hours
- If Barony, touch base with B&B 1x week.
- Write agenda/words
- Send meeting reminders
- Check website for accuracy, notify web minister for updates
- Check mail 2x's month
- Follow up on agenda items
- Get bank statements to exchequer
- Check mailing lists(Antir seneschals, Summits seneschals, branch)
- Reserve meeting site
- Reminder for new business
- Officer updates to superior, summits and website

### Quarterly

- Quarterly report (to superior, cc Baron and Baroness if in Barony, Royal patron if applicable). Reports due on the 15<sup>th</sup> of the month preceding the quarter. Example: Q1 is Jan-March. Q1 report due April 15<sup>th</sup>.
- Ensure all officers submit Quarterly reports to their superiors and copy seneschal and B&B if in Barony.
- Ensure EIF's are filed
- Update officer roster
- Get membership stats from P Sen
- Review exchequer Quarterly reports
- Reminders to officers regarding Quarterly reports(2 weeks prior)
- Quarterly due dates: 4/15, 7/15, 9/15, 1/15

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### Yearly

- Doomsday Report due Jan 1
- Check zip code ranges and update as needed
- Review exchequers d day
- Reserve meeting sites for entire year
- Turn in Date Reservation Forms for all planned events
- Ensure copies of officer's membership cards are up to date. A new copy should be made when their membership has expired

### Events

- For all champions get contact info
- Submit waivers and gate sheets to kingdom
- Submit NMS to kingdom
- Receive and review monthly event reports
- Receive and review final event reports
- Give feedback to autocrats
- Approve Crier copy
- Ensure Crier copy has been submitted
- Approve comp list
- Approve all advertising
- Approve event staff
- Approve schedule
- Supervise or assign a supervising autocrat as needed
- Sign all contracts
- Ensure that all SCA policies are followed

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