

Chester and District Radio Society

The Society's Equipment: Loan, Records and Transfer Between Members

The radio-related equipment the Society owns has, for most of its time with the Society, been informally in the care of a member rather than at a regular venue, and when another member has needed it, has been passed direct to the new borrower by mutual agreement. As more expensive equipment has been acquired, and as the value of some older and less-used equipment has inevitably fallen away, the Society committee has decided that formal records of it had to be kept. Doing so was part of the responsibility of members and more especially of the Society's officers to safeguard the assets entrusted to them; but it should also mean that the condition and whereabouts of any item could be determined at short notice, and that the history of the item could be retrieved in case of recurring problems with it.

Accordingly, the Committee appointed an Asset Manager (AM)* to set up and implement this function and so help ensure that the equipment will continue to be available for loan – and that if anything does go wrong, the best possible solution can be found. The AM records will be used as a matter of routine to print documents kept with the equipment (transfer forms, fault reports etc) and running reports for the Committee.

Direct handovers of loan between members will still be normal; to have to involve the AM as intermediary every time would be unworkable and quickly break down. However, the standard paperwork referred to will have to be adopted for the records to be consistent and to lend themselves to audit from time to time. With regard to data protection, the authoritative record of personal detail remains with the Society's Hon. Secretary; the equipment records (whether in electronic storage or not) will contain only the minimum needed to identify a borrower and a skeleton reference to place, providing for times of urgent need, when travel time may be have to be taken into account.

A special case arises where an asset will be passed temporarily from member to member, perhaps many times over the year, for use in the Society's activities. The full paperwork model is not practicable for this, and instead, the Committee have agreed that one member of the Society, with his/her agreement, should be principal holder of the asset under otherwise normal loan terms, and he/she would be able to release the asset for the activities, off the record but retaining responsibility for it.

The standard paperwork set should be kept with equipment on loan, or with the principal holder, for the duration of the loan.

It will consist of

- A checklist including all hardware accessories and sundries** which should be on loan with the equipment, including test or safety certificates, digital storage media, manuals and guarantee cards (all from the original manufacturer, or later additions, as long as still supporting the equipment) the Society has kept.
- A transfer form, showing the name of the current borrower and with 'condition at handover' and new borrower sections blank, to report condition at handover and obtain the next borrower's details and signature;

- A fault report form, which may be plain paper or an adhesive label. The labels printed from the database adhere well, and usually require only a small strip of backing to be cut off at each end to be secure. If sticking might spoil the finish of the equipment, they will be punched and should be tied instead. The form should otherwise be blank for equipment in the condition stated on the transfer form, unless a running reminder of a fault is needed and where the equipment can safely continue to be used with the fault present. The borrower must note the symptoms on the fault report if a new fault arises while he has the equipment. When a fault is present, the report should for practical reasons be attached to the main item, even if the fault is in a dedicated accessory. If a faulty 'accessory' is not dedicated but documented as a stand-alone item, the report should if possible be attached to it.

*sometimes referred to as 'Equipment Manager' or 'Equipment Officer'

** For this purpose, 'accessories' means items of value, or importance to the parent item of equipment, significant enough to call for their own unique records, as if they were stand-alone assets. They may or may not be labelled with make, model and serial number of their own, and while some may be potentially usable away from the parent, they are currently deemed to be part of the kit and are not issued separately. An item cannot be an accessory for more than one parent at a time. If circumstances change, it may be assigned to a different parent or be treated as stand-alone. 'Sundries' covers lower-value and commonplace items not uniquely identified (except, where appropriate, via their description) but still required to make the kit complete.

The handover procedure and the part played in it by the transfer form are described in the document *CDRS Equipment Handover*, reproduced on the reverse of the transfer form.