

# VOLUNTEER COMMITTEE ROLES

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The essential Officers of a Chartered Institute committee comprise of a Chair and Treasurer. A Secretary role is advisable and Vice-Chair is optional. These roles are agreed by the Committee.

Role descriptions will be refreshed and updated when appropriate.

Officers take on their role for a minimum of one to a maximum of three years. As we are membership organisation, committee members must be individual members of the Chartered Institute of Fundraising and be advocates of the Chartered Institute.

## Officer Role Descriptions:



### The Chair

- The main committee contact with the Chartered Institute. Substitute may be appointed temporarily, by agreement with the Volunteering team.
- Accountable to the Chartered Institute, following all governance matters.
- Presides over all their group meetings where they are present and have the casting vote at Committee meetings where necessary.
- Ensures all events and forums have the correct procedures in place to be safe and requires that committee members also abide by these.
- Furthers the interests of the Chartered Institute promoting its policies and initiatives, taking direction from the Volunteering team.
- Ensures the delivery of an annual member-focused activity programme.
- Regularly communicates the complaints procedure to group members.
- Believes complainants if an allegation is made and ensures they know and follow the formal processes to go down to report this.
- Undertakes and applies all safeguarding and other necessary training to equip them in their roles. Directs members of our committees to this too.
- Ensures that they and their committee abide by the Chartered Institute Code of Conduct and Behaviour, providing challenge where needed.
- Keeps the Volunteering team informed of the group's activities and progress, and shares copies of all mailings to members.
- Responsible for ensuring that relevant communications from central office are circulated to all Committee members.
- Provides pastoral care for committee members.
- Attends reviews with the Head of Volunteering, and all Chairs' meetings



### The Vice-Chair

- If a Vice-Chair is appointed, this position covers for the Chair in their absence. The Vice-Chair does not automatically fill the role of the Chair when the Chair retires. Details of the role are agreed within the committee and work is delegated by the Chair.

# VOLUNTEER COMMITTEE ROLES

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## The Treasurer

- Responsible for maintaining written financial records on behalf of the group.
- Responsible for managing access to online banking tools, flagging any issues or anomalies with the Volunteering team.
- Sends group accounts to the Chartered Institute in line with Chartered Institute procedures (currently quarterly reports) and as periodically requested.
- Working with the Chair, creates and submits an annual budget for the group.
- Signs off on group finances with the Chair, within the limits delegated by the Chartered Institute.
- Submits relevant expenditure to the Volunteering team each week (current deadline of Tuesday close of business).
- Responsible for maintaining receipts and records of income and expenditure. To be stored confidentially for 7 years.
- Informed of conflicts of interest regarding financial processes and makes the committee and Volunteering Relationship and Membership Manager aware of any concerns.
- Attends an induction, and necessary training.
- Ensures all events have a Chartered Institute of Fundraising individual member benefit (discounted ticket rate).
- Liaises with the Volunteering team if they receive any unexpected income
- Helps ensure events will not run at a loss by monitoring income and expenditure



## The Secretary

- Responsible for organising committee meetings, and recording minutes and related action points.
- Responsible for maintaining the register of all committee members and keeping the Volunteering team updated at all times.
- Responsible for collating and returning volunteer agreements for all committee members.
- Ensures that all committee members complete essential training in a timely way.
- Supports the Chair in administrative tasks not otherwise covered by committee roles.
- Records and reports on conflicts of interest in committee meetings.
- Attends an induction, and necessary training.

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In addition to the Officer roles, depending on the activities of your group we encourage you to elect the following roles on the committee. If you are considering roles outside of those mentioned below, please contact the Volunteering team in the first instance for support shaping a role description.

**Membership Champion** – Helping to recruit new Chartered Institute members and directing people to sign up to hear more from the group via the Chartered Institute website. Ensure your group is equipped to promote membership at all relevant opportunities and share the individual member discount code relevant to your event. Working with the Chartered Institute Membership team, report on members in your group specialism or area.

**Communications Lead** – Keeping in touch with members and fundraisers through the committee's networks on social media and email, using approved processes. Promote the group events and activities, and share relevant information for your community of fundraisers, from the Chartered Institute team or news from the sector.

**Policy Lead** – The key contact on the committee for policy related to your group's specialism or area. Work closely with the staff policy team to share expertise and inform decisions where relevant.

**Events Lead** – Co-ordinating and organising meetings, i.e. setting dates in advance, booking venues, co-ordinating speakers, setting prices for events with a reduced rate for Chartered Institute members, marketing etc.

**Training Lead** – Nations and regional groups should aspire to deliver the Introduction to Fundraising training course (currently managed centrally and delivered online). Any additional training should be agreed with the Chartered Institute's Professional Development team in advance. The Professional Development team will work with Training leads across the groups to help structure relevant training.

**Sponsorship Lead** – Working closely with your group's Events Lead and the Partnerships team at the Chartered Institute to find and engage with potential sponsors for your group's events and activities. Responsible for managing the relationships and delivering on agreed outcomes.

**EDI Champion** – An advocate for diversity on the committee, at events and in event planning stages. Work with the staff team to champion equality, diversity and inclusion in the sector and throughout the volunteer network.

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**RAISE Champion** – working with the Chartered Institute RAISE programme to support Arts and Cultural Fundraisers and ensuring the Arts are championed.

**Bursary Lead** - Works with the Treasurer and Chartered Institute staff team to deliver bursaries and enable more fundraisers to access Chartered Institute events and training via your group's designated funds.

**Mentoring Lead** – Takes the lead on the mentoring programme delivered by your group (if relevant). Create partnerships between fundraisers in your region or specialism, adhering to all safeguarding and wellbeing guidance provided. Encourage, support and grow the sector.

# VALUES & BEHAVIOUR

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Our values underpin all areas of our work and guide us in all that we do. We encourage each other to be:

**Passionate** - taking pride in what we do and driven by success.

**Professional** - championing and achieving high standards and governed by professional integrity.

**Enabling** - helping others and empowered to take ownership, find solutions, make decisions and collaborate.

**Enterprising** - open to new solutions and committed to delivering where we already excel.

**Respectful** - honest and fair, treating everyone with consideration and respect.

- As your professional body, we will always support you in delivering excellent fundraising for the fantastic causes you represent.
- Part of this is a commitment to ensuring that our members conduct themselves in the right way to a high level of professional behaviour.
- We have high expectations of our members' behaviour and conduct and have published an updated [Code of Conduct](#) and [Disciplinary and Complaints Process](#) which applies to all members.

Together we will build, support and develop the UK's talented and vibrant community of fundraisers and will contribute to creating a space where each and every one of us can safely work, network, and learn.

Our plan for 2021 can be found on the website <https://www.ciof.org.uk/2021>

