

STEP-BY-STEP GUIDE FOR VOLUNTARY AND COMMUNITY GROUPS



These pages will talk through what you need to have in place to set up a voluntary and community group, and the options that are available to you.

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Management Committees:

A committee is a group of elected people who come together on a regular basis to consider issues of how a group is organised and run, and what is needed to help groups to achieve their aims.

This group of people is usually called the Management Committee, Executive Committee or Board of Trustees; although they could choose to be called anything they wish.

Committee members ALL share responsibility for ALL aspects of the organisation and its activities. In particular the committee member has a legal responsibility to ensure that all decisions taken by the committee:

- reflect the values, purposes and policies of the organisation;
- respect any promises given to members, users and/or funders;
- accord with proper management of the groups income and assets; and
- are in line with equal opportunities.

The executive committee cannot delegate control of, or responsibility for the charity to any other people, but they are always welcome to seek help and advice from others. When all is said and done, the members of the **management committee have overall responsibility for their group at all times!**

Six key roles for the Executive Committee

The executive committee has the final responsibility for the organisation. If things go right you might be praised. If things go wrong you get the blame! Each member shares this responsibility.

The committee needs to work together to ensure that:

1. The organisation works effectively towards its aims (as given in the constitution) and has a clear sense of direction. This involves a lot of planning and discussion
2. Money and resources are:
 - managed properly
 - used to help the organisation work towards its aims
 - used for the purpose for which they were given

(this is the responsibility of all committee members, not just the Treasurer)

3. The organisation is accountable (answerable) to funders and members. Can you show that it is doing what it is supposed to do?

4. All activities are legal. Nobody expects a trustee to know everything about everything! But if you are unsure, it is your responsibility to check things out!
5. People working for the organisation as staff and volunteers are properly supported and managed
6. The committee manages itself properly

The Role of a Chairperson: What does it involve?

The Chairperson is elected to lead the committee towards achieving its main aims. The Chairperson steers the committee through meetings, by following a pre-agreed agenda, and has casting vote when decisions are tied.

A good Chair will allow everyone to have their say, but keep the meeting focused on the topic at hand. They will have good organisational skills and are able to form good working relationships.

What are the main tasks?

A Chair's duties are not immediately obvious but include:

- Representing the group as a whole, upholding the views of the members and speaking on their behalf where and when necessary
- Preparing the agenda with the Secretary before each meeting, whether it is of the executive committee or an open meeting
- Introducing sufficient formality in the meetings to ensure that all business is dealt with efficiently
- Giving all members in a meeting an equal chance to express their views, handling the overconfident tactfully, and giving encouragement to the timid
- Keeping a balance in meetings, trying always to reach unanimous decisions. Frequent votes only result in the formation of sub-groups and a loss of unity; so, after all the facts have been presented and all views expressed, the Chair should try to voice the feeling of the majority in such a way that the dissenters are satisfied that the decision is the best for the group as a whole
- Checking after every item of business that the Secretary knows what to record in the minutes
- Ensuring that the decisions of the Committee are carried out
- Constantly looking out for suitable people to take the places of present officials and committee members when their term of office comes to an end. Whenever possible, such people should be given the opportunity for some form of training to do these jobs in future
- Helping to interview and induct new staff and volunteers (if any)

Can this work be shared?

For most volunteers this is too much work and yes it often needs to be shared. It can also be good to share it as it is important to use the skills of others on the committee. So it may be appropriate that, for example, a person other than the Chair acts as the contact person with the 'outside world'. Some organisations elect a deputy chair.

The most important thing is for the Chair to keep an overview of the organisation and they should choose to do tasks that will help with that.

The Role of a Secretary:

What does it involve?

The Secretary has many responsibilities, but these can be shared with the other committee members. This is a good way to use the skills of others on the committee, by delegating some of the secretary's responsibilities to elected officers e.g. a membership secretary.

What are the main tasks?

- To take accurate notes (minutes) at meetings and circulate, along with other relevant documents
- To receive apologies for people who can't attend meetings
- To keep an up to date membership list and contact details
- To arrange meetings (book venues, publicise etc.)
- To help the Chairperson to make up an agenda
- To deal with any correspondence to the group, and deal with insurances, publicity etc.
- To check meetings are quorate (i.e. there are enough people at each meeting)
- To check the progress of work

The Role of a Treasurer:

What does it involve?

A Treasurer is the main person in a group who takes responsibility for controlling the money. The purpose of this role is to maintain an overview of the charity's financial affairs, and ensure that money is properly maintained, spent and recorded.

The proper management of money is vital and not only for obvious reasons. Simply by doing the job properly the Treasurer performs an important public relations role because the way a group handles its finances have great impact on the outside world's view of the group.

What are the main tasks?

- to ensure that accounting procedures and controls are in place
- to ensure that any money is handled according to financial rules
- to record all transactions and give receipts for all monies received
- to ensure that the financial resources of the charity meet its present and future needs, advising on the financial implications of the organisation's strategic plans
- to liaise with paid staff and volunteers about financial matters
- to regularly inform the committee of the financial position
- to oversee, approve and present budgets, annual statements of accounts and financial statements, including a report for the Annual General Meeting
- to ensure that the accounts are prepared in the form required by law, included in the annual report and submitted to the relevant statutory bodies, e.g. the Charity Commission and the Registrar of Companies*
- to ensure that any recommendations by the financial auditors are implemented*
- ensuring that financial investments are consistent with the aims and objects of the charity and its legal responsibilities

Other points to bear in mind:

- When funds are raised from the public accounts should be made public (this helps to give the committee a sense of accountability)
- S/he should allow as few people as possible to handle the group's money
- Large amounts of cash should never be kept in hand
- Personal cash should never be allowed to become muddled with the groups funds

The Treasurer should keep the Committee regular informed of the financial position. Monthly or quarterly statements should be presented to the Committee for approval. The prime aim is to ensure that the anticipated expenditure will not exceed the expected income.

*The minimum legal requirements for accounts scrutiny of unincorporated charities (those who are not companies) in England is as follows:

Organisations annual income level	Minimum permitted scrutiny of accounts
Unincorporated Charitable organisations with income below £1,000	You do not have to register with the Charity Commission but have to keep accounts which must be approved annually by the executive committee
Unincorporated Charities with income over £1,000 and below £10,000	'Light touch regime': you have to prepare a simple annual return to the Charity Commission which is approved by the trustees and to submit annual accounts and reports if requested (it is however best practice for those at the higher end of this band to have accounts independently examined)
Unincorporated Charities with income over £10,000 and below £250,000	You have to submit annual accounts and reports to the Charity Commission, which have been independently examined by a suitable person (it is however best practice for those at the higher end of this band to have accounts fully audited)
Unincorporated Charities with income over £250,000	You have to submit annual accounts and reports to the Charity Commission, which have been fully audited

(Source: adapted from Morgan, 2002)

For Further Support:

Contact RVS: info@rvs.org.uk or call 01252 540162

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