

Roles Within a Group

Usually there are three main “officers” or “office bearer” positions within an organisation:

1. Chairperson
2. Secretary
3. Treasurer

Some organisations also have a Vice Chairperson who takes the Chairperson’s role in his or her absence. Your organisation may also choose to delegate committee members “areas of responsibility” depending on the projects and/or roles of your organisation. For example, some groups delegate “Funding Coordinators” who have the role to coordinate and apply for funds and grants. It is a good idea to link people with areas that they are interested in or suited to.

Each of the three main positions has a specific role and duties and members are nominated and elected into these positions according to the organisation’s rules:

- In a **Society** members are usually nominated for the officers’ positions prior to the AGM (according to process prescribed in this Society’s constitution) and elected on the day of the AGM.
- In a **Trust** the trustees elect these positions amongst themselves, in accordance with their trust deed.

CHAIRPERSON

The chairperson is often the public representative of the committee/organisation to the community. It is their job to lead strategic planning & meetings. They need to be able to manage relationships in the group, and encourage all members to participate in discussions and decision making. It is their job to stimulate, not dictate.

Specific Duties of the Chairperson

- conducts meetings;
- prepares meeting agenda’s (sometimes in conjunction with the secretary);
- ensures meeting decisions are accurately recorded.

What is expected of a Chairperson?

- a hardworking attitude – so things get done;
- firm but fair approach – letting all in the group have their say;
- decisive and succinct – so decisions can be made quickly and group discussions don’t go off on tangents;
- to be stimulating and motivating – moving the group towards completing its common goals;
- to be knowledgeable – on general issues that may affect the group, and also the specifics of what the group is working on;
- to be impartial – not forcing their own point of view on the group.

WRITING YOUR ANNUAL REPORT

Presented at the Annual General Meeting (AGM) by the organisation Chairperson, the annual report is an important document which sums up the group’s current status and its achievements over the past year. This can be an effective tool to demonstrate accomplishments, cultivate new relationships, and recognise important people. It can also be a great document to include with funding applications.

Here are some guidelines for writing an annual report:

- report only on the 12 months preceding the AGM;
- report on achievements rather than activities (i.e. mission related achievements rather than administrative or fundraising activities);
- photos of events and projects can be a great addition to the report;
- if you are having your accounts audited, make sure the treasurer has allowed enough time to have this completed for the report;
- report on the number of current financial members if applicable;
- type the report and have it photocopied so it looks professional;
- keep a copy in the archives;
- include any future plans for the next 12 months;
- acknowledge supporters and volunteers;
- be concise!

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SECRETARY

The secretary is the record keeper of the organisation. A secretary needs to be a practical and organised person who has great attention to detail.

Specific Duties of the Secretary

- taking minutes during meetings (if the Secretary is absent someone else should always take the minutes);
- sending out correspondence and minutes to committee members;
- liaising with guest speakers;
- booking meeting rooms & catering etc;
- administrative duties.

For information on minute taking see Information Sheet 2.

TREASURER

The treasurer is responsible for reporting the financial affairs of the organisation to the group. They do not necessarily need to have a financial background, they just need to be organised and methodical.

Specific Duties of the Treasurer

- record any income and expenditure;
- keep a balance/statement of the accounts;
- present any invoices to the group for approval for payment;
- payment of invoices;
- collect and receipt any membership fees if applicable;
- maintain and record receipts for auditing;
- prepare a statement of accounts annually for presentation at the AGM (these may also need to be audited externally, depending on your organisations structure and requirements);
- ensure financial reports are filed with the Charities Commission & Companies Office where appropriate.

For information on financial reporting see Information Sheet 5.

CHANGING OFFICERS

When the positions change hands the past officers need to make sure that they forward documents and information to the newly elected officers. All information should be written down (e.g. important contacts of people or organisations that have supported you in the past, unfinished projects, outstanding accountability for past funding grants etc). Recording information in writing is crucial for the continuation and successful operation of any community organisation.

CONTACT DETAILS

It is particularly important to make sure that contact details for your organisation are updated when the officers change. Often the Secretary's address will be the "address for communication" recorded with the Registrar of Societies, and this needs to be updated if changed. If you are registered with the Charities Commission you are required to inform them of the change also. There may be other key organisations you keep your details with such as the IRD, your local Venture Southland Community Development Planner, & organisations you are affiliated to etc.

Information prepared by



LINKS / WHERE TO GO FOR MORE INFORMATION:

www.community.net.nz/how-toguides/crk/ (Section 4)

www.actcoss.org.au/oik/sections/boards.html

*For more information or help you can also contact your local Community Development Planner at Venture Southland:
143 Spey Street, Invercargill
Ph: 03 211 1400
enquiry@venturesouthland.co.nz
www.southlandnz.com*