



Roles of local officers

Role of the Chair

The role of the Chair is one of co-ordination and organisation. The Chair's job is to:

- Chair meetings, events and webinars - agreeing the agenda with the Secretary for Branch Council / Section Committee meetings and AGMs
- To lead on the development of an events programme with topic and speaker ideas, with the help of the Branch Council / Section Committee
- To help to co-ordinate meetings and local events, with the help of the Branch Council / Section Committee
- To have a casting vote on the Branch Council / Section Committee
- Sections and Divisions do not have Presidents: The Chair of a Section or Division will usually fill this role locally.

The term of office is normally a minimum of three years and maximum of six years in succession (subject to BDA and Branch Council / GMC agreement).

Role of the Secretary

A voluntary secretary is the first point of contact for the BDA staff and local BDA members. The secretary's name will appear in the contact section of the BDA membership database for their Branch / Section / Division and BDA staff will put local BDA members in touch with the secretary as appropriate.

The role of Secretary may be divided between two or more members of the Section committee/Branch Council if required – eg: one person could liaise with the speakers, another could look after the venue / catering / AV side of things, another could manage sponsors and/or social media, and another could organise your Section committee meetings / Branch Council meetings.

So effectively, you can create officer roles like:

Assistant Secretary
Meetings Secretary
Sponsorship Secretary
Social Media Secretary
Social Secretary
Membership Secretary

Alternatively, you can accommodate interest in joining the committee from new members to be involved as General Committee members to help with ideas and anything that the Section/Branch needs to do. Then at Section committee meetings/Branch Council meetings you can ask for assistance for any specific tasks/actions.

Secretary's role

1) Membership

- Welcome new members to your meetings and to the Association as a whole.
- Help maintain contact with members of the Branch, Section, Salaried Group or Division that live within the Branch, Section or divisional boundary.

2) Branch, Section or Divisional Affairs

- Maintain copies of Branch, Section, Salaried Group or Divisional rules so that they are available and updated when necessary, ensuring that changes are notified to the Local Services Team.
- Prepare agendas and minutes for your area's Council or Committee meetings – and submit a copy of agendas, minutes and any papers/reports for AGMs to the Local Services Team.
- Working in conjunction with your wider Branch Council / Section Committee, arrange CPD, social, and Branch Council / Section Committee planning meetings. Agree topics, invite and confirm speakers, book venues, source sponsors, etc.
- Provide notice to the wider committee in good time for planning / committee meetings. It is useful to share the date of your next planning meeting with the Local Services team, especially if you require a link to hold your meeting via the GoToMeetings online platform. Please send details of any CPD / social meetings to the Local Services Team using the Events Information Form supplied. As a guideline the following notice is required:

Evening events: Minimum of 6 weeks notice

Day events or an evening dinner: Minimum of 2-3 months notice

- Once the form has been received by the Local Services Team, the event will be set up on the registration system and on the website for bookings, and emails will be scheduled to advertise the event.
- Return signed attendance registers from events to the Local Services Team in a timely manner (preferably within a week of the event taking place) to ensure walk-ins can be followed up for payment where appropriate; CPD certificates sent to those who hadn't pre-booked; all attendees marked up on the system for GDC verification; and the attendance/financial reconciliation completed.
- Deal with correspondence and report such activity to the next business or committee meeting, as appropriate.
- For Section and Divisional Secretaries, ensure that the Branch Council / Group Management Committee (GMC) receive a quarterly or annual update on the activity of your Section / Division, as requested.
- The term of office is normally a minimum of three years and maximum of six years in succession.

3) Returns and reports

The following returns and reports should be sent to the Local Services Team annually:

- (i) The names of the Officers elected at each AGM of the Branch, Section, Salaried Group or Division
- (ii) For all Salaried Groups a copy of the Annual Report of the activity of the Division should be sent no later than four weeks before the date of the group's AGM for inclusion in the proceedings of the AGM

- (iii) Annual accounts of a Branch or Salaried Group should be forwarded to the BDA Finance Manager
- (iv) Annual accounts of a Section or Salaried Division should be forwarded to the Branch or Group Treasurer as soon as possible after the end of each financial year (usually 30 September).

4) Elections for new officers

- Branch, Section, Salaried Group and Divisional elections. These should be conducted, according to the rules of the Branch, Section, Salaried Group or Division, and normally take place at an AGM, though on occasions it may be necessary to convene an Extraordinary General Meeting, should a vacancy arise in the middle of the year.

Role of the Treasurer

The name of the Treasurer of a Branch, Section, Salaried Group or Salaried Group Division, will appear on the BDA's membership database for this particular task. The Treasurer is the person that the BDA will refer to regarding any financial issues for your Branch, Section, Group or Division.

You should deal solely with all monetary issues, banking (if account held locally) and preparation of accounts in accordance with the governance issues. Salaried Groups should prepare, in conjunction with your Group Management Committee (GMC), a bid for consideration by the BDA Finance Committee for the grant offered by the Association.

The role of Treasurer may be divided between two members of the Section committee/Branch Council if required, eg: by having an Assistant Treasurer.

Treasurer's role

- Maintain a record of Branch, Section, Group or Division bank accounts and inform the Finance Team at Wimpole Street and/or Local Services Team of any new accounts set up.
- Ensure that the Finance Director or Finance Manager are set up on the bank mandate as an approved signatory, especially for Branch and Salaried Group accounts (these signatories are not intended to sign cheques, but are there as a safeguard should funds not be accessible for any reason).
- Receive the annual grant and any sponsorship income payable to the Branch, Section, Salaried Group or Salaried Group Division and make any payments as directed by the Branch Council, Section Committee or GMC.
- Maintain accurate records of all income and expenditure both for the general purposes of your area and for any individual restricted donations.
- Prepare a balance sheet / annual accounts of the finances for your area and keep copies of supporting documentation.
 - Sections and Salaried Group Divisions Treasurers should send their annual report to the Branch Treasurer or Group Secretary respectively, for inclusion in their finance report at the Branch Annual General Meeting (AGM).
 - Branches and Salaried Group Treasurers should prepare a Branch-wide annual report which should be approved at the Branch AGM. Once approved at the AGM the Branch / Salaried Group accounts must be submitted to the Finance Manager at BDA Headquarters. (NB. BDA grants will not be issued unless annual accounts are received, or AGMs held).
- The term of office is normally a minimum of three years and maximum of six years in succession (subject to BDA and Branch Council / GMC agreement).

Role of general committee members

The role of additional general committee members is to attend committee meetings and help generate ideas for future events, whether topics, speakers or venues. They would assist on the night of an event, perhaps help with registration or liaison with the venue, so it's not always the Chair or Secretary doing this. Having a larger committee can also help with succession planning should the Chair, Secretary or Treasurer step down for any reason.

As well as general committee members, as explained above additional committee roles may include Assistant Secretary, Assistant Treasurer, Sponsorship Secretary, Meetings Secretary, Social Secretary, Social Media Secretary, or Membership Secretary.

Please note that all committee members need to be BDA members.

Event management activities

Event management tasks carried out by volunteer local officers:

- Organising regular committee / planning meetings
- Deciding what topics should be covered at events
- Inviting and liaising with speakers
- Identify, confirm and liaise with suitable venues – ordering catering and AV required
- Draft and work to a budget for each event
- Deciding what prices to charge delegates and exhibitors/sponsors
- Identify, invite and invoice exhibitors/sponsors
- Running the event – welcome and liaise with delegates, speakers, exhibitors/sponsors and the venue staff.

Role of the centrally-based Local Services Team

The Local Services Team is comprised of seven staff working from Head Office in London and is part of the larger Events Team. They work closely with all local officers to ensure successful events / meetings and to provide support and advice locally. Some of the tasks carried out by the Local Services Team are:

- Maintaining a central database of all dentists and DCPs in the UK
- Assisting with speaker / topic and sponsor / exhibitor ideas
- Sending surveys or any communication from the local team to local members
- Full marketing support – creating a web page for each event, promotional emails sent on a Sunday via DotDigital (our GDPR compliant email system), flyers sent by post when requested, (cost covered locally), social media marketing
- Full registration support – processing bookings and payments (online, phone, email, post), collecting dietary requirements and seating requests for social events
- CPD support – providing the attendance register to the local officer, making CPD certificates with reflection sheets available on the CPD portal, providing online feedback surveys, and providing replacement certificates for up to 10 years after an event
- Post event – providing a feedback report, reconciliation of payments, providing attendance and financial reports to the local team.