



Roles of local officers

Role of the Chair

The Chair is responsible for providing leadership, co-ordination and oversight of the Branch, Section or Division. The Chair's responsibilities include:

- Chairing meetings and events, and agreeing agendas for planning meetings and AGMs with the Secretary
- Leading the development of the annual events programme, working with the committee to identify topics and speakers
- Supporting the planning and co-ordination of meetings and events alongside the committee
- Exercising a casting vote on the committee where required
- Acting as the local figurehead for the Branch, Section or Division. As Sections and Divisions do not have Presidents, the Chair will usually fulfil this role.

The term of office is normally a maximum of six consecutive years, subject to the agreement of both the BDA and the committee.

Role of the Secretary

The Secretary is the primary point of contact for both the Local Services Team and local dentists. The Secretary's name will appear in the contact section of the BDA membership database for their Branch, Section or Division, and BDA staff may direct local members to the Secretary where appropriate.

The role can be shared between two or more committee members. For example, one person may liaise with speakers, another may oversee venue, catering and AV arrangements, another may manage sponsorship and social media activity, and another may coordinate planning meetings.

Larger committees may choose to divide the Secretary role into a number of specific positions, including:

- Meetings Secretary
- Speaker Secretary
- Sponsorship Secretary
- Social Media Secretary
- Social Secretary

- Membership Secretary
- Young Dentist Representative

Alternatively, new committee members may join as General Committee Members, contributing ideas and assisting with activities as required. Planning meetings can then be used to allocate specific tasks and actions to those willing to help.

The term of office is normally a maximum of six consecutive years, subject to the agreement of both the BDA and the committee.

Secretary's responsibilities

- Welcome new members to meetings, introduce them to other committee members and the wider Association
- Help maintain engagement with members of the Branch, Section, Group or Division within the local area
- Maintain copies of the local area's rules ensuring any amendments are notified to the Local Services Team
- Prepare agendas, minutes and action logs for planning meetings and AGMs, and submit AGM papers to the Local Services Team
- Work with the wider committee to organise planning meetings, CPD events and social events, including booking venues and AV, agreeing topics, inviting and confirming speakers, and securing sponsorship where appropriate
- Give committee members sufficient notice of planning and committee meetings. It is helpful to share the date of your next planning meeting with the Local Services Team, particularly if you require a GoToMeeting link to host the meeting online
- Submit details of all CPD and social events to the Local Services Team using the Event Information Form

As a guide, the following notice periods should be provided:

Evening events: minimum of six weeks' notice

Day events or evening social events: minimum of two to three 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 to the Local Services Team as soon as possible after an event, ideally within two working days. This enables the team to follow up with walk-in attendees and collect payment where required, send a feedback survey; issue CPD certificates, update attendance records on the BDA database, and complete attendance and financial reconciliations.

Role of the Treasurer

The Treasurer's name will be recorded in the BDA membership database as the designated contact for financial matters relating to the Branch, Section, Group or Division. The Treasurer is the primary point of contact for the BDA on all financial matters concerning their Branch, Section, Group or Division.

The Treasurer is responsible for overseeing financial transactions, including the receipt, banking and administration of funds, and for preparing accounts.

For Salaried Groups, the Treasurer should work with the Group Management Committee (GMC) to prepare a funding bid for consideration by the BDA Finance Committee.

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

Treasurer's responsibilities

- Receive monies payable to the Branch, Section or Salaried Group, and make payments for events organised
- Maintain accurate records of all income and expenditure, including any donations
- Ensure that petty cash and any other cash balances are securely held and properly administered
- Maintain an up-to-date record of any bank accounts held by the local area, and notify the Finance Team and Local Services Team of any changes to signatories
- Ensure the Finance Director or Finance Manager is included as a signatory on bank mandates for any locally held accounts. These signatories are not intended to authorise transactions but provide a safeguard should access to funds be restricted for any reason
- Prepare a balance sheet and financial report for presentation at the Annual General Meeting (AGM)
- Provide these financial reports to the BDA Finance Department when requested.

Please note: BDA grants cannot be paid until the required accounts have been submitted to the BDA Finance Department and the AGM has been held.

The term of office is normally a maximum of six consecutive years, subject to the agreement of both the BDA and the committee.

Role of general committee members

The role of general committee members is to attend planning meetings and help generate ideas for future events, whether topics, speakers or venues. They assist on the night of an event, help with registration or liaison with the venue - it's not always the Chair or Secretary doing this. Having a larger planning committee can 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, Meetings Secretary, Speaker Secretary, Sponsorship 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 activities carried out by volunteer local officers

- Organise regular committee / planning meetings
- Decide what topics should be covered at events
- Invite and liaise with speakers
- Identify, confirm and liaise with suitable venues – order catering and AV as required
- Draft and work to a budget for each event
- Decide what prices to charge delegates and exhibitors/sponsors
- Identify, invite and invoice exhibitors/sponsors
- Run the event – welcome and liaise with delegates, speakers, exhibitors/sponsors and 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 activities carried out by the Local Services Team are:

- Maintain a central database of all dentists and DCPs in the UK
- Assist with speaker / topic and sponsor / exhibitor ideas
- Send surveys or communications from the local team to local dentists and their team
- 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 – process bookings and payments (online, phone, email, post), collect dietary requirements and seating requests for social events
- CPD support – provide the attendance register to the local officer, making CPD certificates with reflection sheets available on the CPD portal, provide online feedback surveys, and provide replacement certificates for up to 10 years after an event
- Post event – provide a feedback report, reconciliation of payments, provision of attendance and financial reports to the local team.