

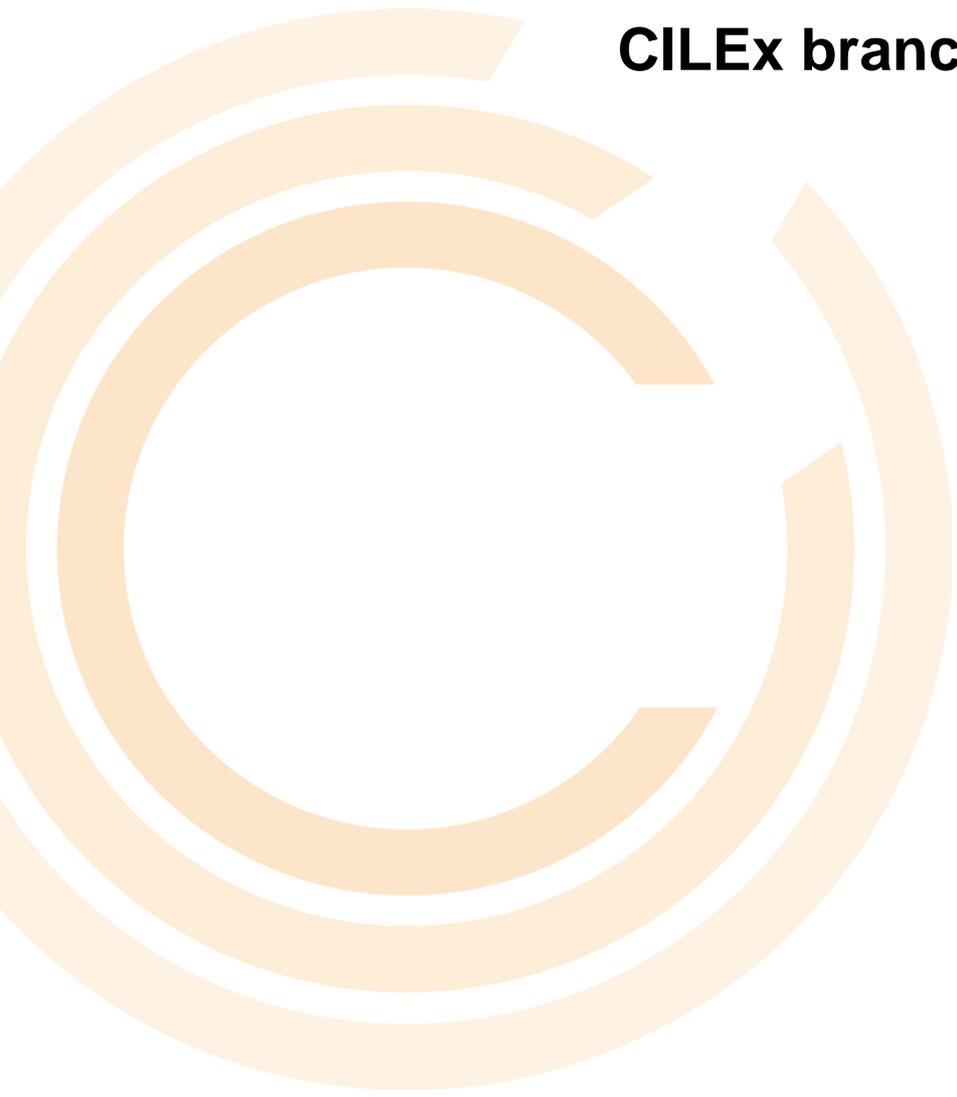
BRANCH START UP AND GOVERNANCE



2

GETTING STARTED

The all you need to know guide on starting a CILEx branch



Role Descriptions for Committee Members

What being Chair is all about

Every branch needs someone to lead it: to show the way forward, to encourage your members and to motivate them into greater effort. This is your task as Chair and by definition, it is the most important and difficult task.

Your responsibilities include:

- Setting branch objectives and ensuring that they are agreed with by your committee and your branch membership
- Developing good teamwork
- Motivating your team
- Making sure that tasks are delegated and that everyone has a job
- Communicating to everyone so that they all know what they are doing
- Representing your branch where required

How do you relate to other members of your branch

It is important to lead the members of the committee. As a leader, you set a good example by being punctual, planning in advance, keeping cool in difficult situations and listening to other people's comments.

In a Committee meeting, all members are equal. Each should have a say in reaching a policy decision. You have to abide by the majority decision just like everyone else. Once that decision has been reached, then it is your job to ensure that it is carried out. It is up to you to direct your team.

Skills and qualities of a branch chair

- Draw different parts of your branch together
- Recognise key issues and focus branch attention on them
- Be able to formulate alternative solutions to problems
- Be aware of the implications of branch activity and compliance with branch rules (see Annex B)
- Be willing to accept responsibility
- Be able to command respect and exert authority (within the branch and within your business community)
- Be able to motivate people and develop team spirit
- Be diplomatic, able to handle people sensitively and tactfully
- Demonstrate fairness and strength, especially where conflict is apparent
- Be willing to lead where raising the profile of your branch and CILEx generally is concerned

What being Treasurer is all about

Money is important to running the branch successfully and happily. It's your job to know how much there is, and where it is. When you have this information, you can tell the Committee so that they can...

- Make informed decisions
- Ensure your branch activities are profitable
- Ensure sufficient funds are available to pay the bills

The importance of your role in the branch

- You are the custodian of branch funds. The branch relies on you for the accurate recording of all transactions
- It is your job to know and understand the financial implications of branch activities
- Your financial information could govern key decisions made by the Committee
- At any time you should be able to report accurately on the branch financial position
- You should ensure that members who owe money to the branch pay their bills and ensure people owed money by the branch are paid
- Represent your branch where required
- Be willing to lead where raising the profile of your branch and CILEx generally is concerned

Skills and qualities of a branch treasurer

- A communicator who can make complicated things understandable
- Accurate and tidy in presenting reports
- Organised and good with numbers
- A problem solver
- An analyst and forecaster – someone who can work out what the financial future will bring so that branch activities can be planned secure in the knowledge that they will be well funded
- Trusted to deal with other people's money
- Knowledgeable about the branch and its membership

What being branch secretary is all about

You will deal with branch administration.

The importance of your role in the branch

- Being branch secretary involves quite a lot of paperwork. You will need a precise and tidy mind. You will be responsible for completing forms
- You are responsible for maintaining accurate records of all branch committee meetings and decisions taken. A branch meeting minutes template can be found in Annex C
- You are responsible for maintaining accurate membership records and for ensuring that subscriptions are paid and reminders are sent out promptly. If

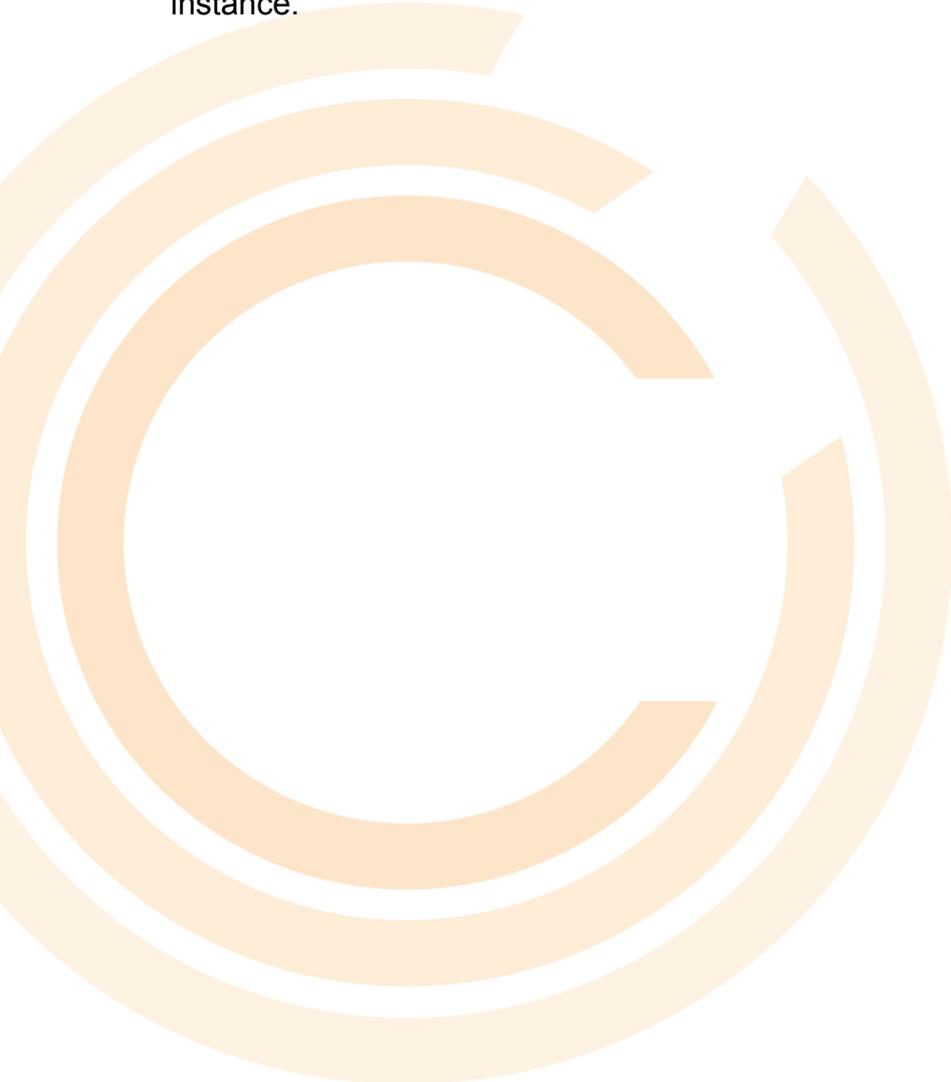
- you are holding membership data you need to be familiar with the CILEx Group Data Protection Policy which you can find in Annex D
- You must ensure that branch members are kept fully informed of branch events (if the branch has a Social Secretary, then that person may take on this responsibility)
- Representing your branch where required
- Be willing to lead where raising the profile of your branch and CILEx generally is concerned

Some skills and qualities you will need

- An ability to grasp and summarise the key points and decisions at meetings
- A logical and organised approach to the business of keeping records and of drafting and presenting notices, minutes and reports
- An ability to co-ordinate, communicate and organise
- Working knowledge of data protection principles

Support for your branch

The Membership Directorate team (MDT) can help support your branch in the first instance.



Points to consider that could help your new (or revitalised) branch enjoy a successful presence in your area

1. **Focus of the branch** – It is important to decide its main aims, its strengths and what its range of activities will be. They could be balanced between academic assistance, social and networking opportunities or biased towards one of these.

2. The aims and objectives of the branch will include:

- The provision of a point of contact for Fellows and Registered Persons who have paid subscriptions to CILEx and live or work in or elsewhere and are entitled to join.
- To continue to raise the profile and awareness of CILEx for the benefit of members and potential members in thearea and nationally.
- To develop alliances with local branches of professional associations, institutes or clubs to provide opportunities for branch members to contribute to the social, educational and training activities of the local community.

3. **Views and Opinions** - Hold one or a series of exploratory meetings to canvass the views and opinions of those interested in joining a branch. These meetings are also useful to agree who will take roles on the branch committee. A committee should be elected although many new committees comprise volunteers for the first year of the branch's existence. A volunteer committee can be officially voted in at the first Annual General Meeting. The exploratory meeting(s) should ask for offers of venues, suggestions for events and contacts with other local organisations or associations. Some branches choose to hold meetings at the same venue each time whilst others take advantage of offers from members who work at locations with meeting rooms that can be made available for branch meetings.

4. **Programme of Events** - It is very important to plan a list of events on a six monthly or annual basis. A good opportunity to make this plan is at the branch annual general meeting, which must be held between 1st January, and 28/29th February each year. Naturally, the plan does not have to be a final plan but it should provide enough information for members to want to include events in their diaries and for new members to note that your branch has interesting and imaginative activities! More ideas for events and how to run them can be found in Section 5 of this toolkit.

5. **Revision Sessions** – All students want the reassurance of extra revision help. Remember when you were in their position? Some branches have run successful revision sessions over several years. These sessions do take a fair amount of organising, especially if the branch area covers several CILEx accredited centres. In many instances, college tutors are happy to help – and so are examiners, if they live in your area, although one or two are prepared to travel. Branches can make a small charge to students for the revision session and use the income to pay for room hire, payment for tutors, examiners or other speakers, handouts, refreshments, etc.

6. **Speakers** – All officially launched branches are accredited to provide assistance for Fellows, solicitors and other professionals in undertaking CPD requirements. Engaging, interesting and relevant speakers provide good opportunities for increasing income,

increasing membership and building on relations with other professions. Some suggestions are given in the next section.

7. Sponsors – Peripheral suppliers (recruitment consultancies, experts, insurance companies, software houses) are keen to support branches with events sponsorship and CPD lectures. The general idea is that a sponsor will pay for, or contribute to, an event in return for an opportunity to advertise services or products. Some will ask for time to demonstrate a service or product to the audience – others will simply pay for refreshments in return for acknowledgement in any speeches.

8. Council Members – A map of the Constituencies of England and Wales together with the Council representatives for these areas is in Annex E.

9. Membership Lists – A branch cannot function unless it has members. It is vital to the success of a Branch to keep and maintain an accurate list of members. The success of a branch depends, to a degree, on the enthusiasm of the person who maintains the list. There are various software packages that help to make this job fairly easy, such as Microsoft Access or Excel which offers list analysis (who has paid their subscription and who hasn't), letter writing and mail-merge facilities. It is also a requirement of the branch rules that membership numbers are notified to CILEx when annual accounts are submitted and that data protection principles are followed.

10. Developing alliances with other Professionals – There's usually someone interested in joining your branch that is/has been involved with or knows about other local branches of other professional institutes or associations. There is also the local Chambers of Commerce, lunch clubs, Federation of Small Businesses as well as the colleges in your area eager to know about your branch activities. These local clubs and associations often struggle to get sufficient numbers to attend events and seminars – joining forces could ensure some really memorable and well-attended events. A list of some of these organisations can be found in Annex F

11. Promoting your branch on the Internet – CILEx will provide each branch with its own micro website, linked to CILEx's main website. It is divided into six sections which include...

News – recent news from your branch.

Committee – Committee details.

Events – information about upcoming events at your branch.

Branch Services – including information about services such as study groups, work shadowing and pro bono work.

Sponsorship – details of any sponsors of your branch and sponsorship opportunities.

Contact us – comprehensive contact details.

It is important to keep the content on your pages up to date. This is particularly the case for branch contact details. We would advise that the content of your pages is checked on a monthly basis.

Social media such as LinkedIn, Twitter and Facebook can help generate further interest in your branch.

Further details can be found in the Marketing & Promotions section of this toolkit.

Why does CILEx want a branch in your area?

- CILEx has over 20,000 students, members and Fellows who pay annual subscriptions. They nearly all want closer contact with CILEx and with other members.
- This was emphasised in a recent member survey – members want the Chartered Institute to raise their profile with the public and improve perceptions amongst employers that Chartered Legal Executives provide professional qualities that should be valued. Branches and their members can help themselves by promoting positive perceptions in their towns, cities and counties. In order to make this happen, it is vital that we have contact points (branches) around England and Wales and in those countries where Chartered Legal Executives can practice.
- Chartered Legal Executives continue to achieve greater acceptance in their working communities, while other professionals seek opportunities to network with them. They often belong to local branches of their own Institute or Association (e.g. Chartered Management Institute, Association of Accounting Technicians, Chartered Institute of Personnel and Development, Institute of Careers Guidance, Professional and Business Women's Association, Round Table, etc.). A CILEx branch is important to act as a facilitator to develop these regional networking opportunities. Contact details and more ideas can be found at the end of this paper.
- Peripheral suppliers (recruitment consultancies, experts, insurance companies, software houses) are keen to support branches with events sponsorship and CPD lectures. These are examples of the value they place on increasing their contact with CILEx members outside the workplace.
- Branches should encourage and help students to start their careers by providing support (revision sessions, work shadowing opportunities, job finding). Students also like to know what your job entails – being positive about why you are a Chartered Legal Executive but also including some “real life” anecdotes can be quite motivating.
- CILEx course tutors, be they law graduates, fellows, solicitors or barristers, often ask for closer contact with branches. They are receptive to being included as affiliate members of a branch and will be more likely to promote your events and activities.
- From our conversations with students and their tutors, we developed a blueprint to see whether qualified and part qualified members would like to get acquainted with and help others who are starting out on their studies.
- The plan resulted in selecting a branch area that was inactive, carrying out a marketing exercise and building on initial positive reactions. This formula has worked several times. It could work for students, Members and Fellows in your area.

Launching a new branch

1. Check no other branches in the area
2. Speak with the Membership Directorate team for advice on launching a new branch. The contact details are branchsupport@cilex.org.uk.
3. Use social media to ask for interest
4. Organise a few informal events to gauge the amount of interest
5. Try and identify key office holders i.e. chair, secretary and treasurer
6. Once officers have been identified open a bank account
7. When bank account is open complete the Branch Grant Application form and send to the Membership Directorate team at branchsupport@cilex.org.uk for the discretionary branch grant
8. Once you have a prospective launch date, please forward details to branchsupport@cilex.org.uk.
9. Invite Council Members in your area.
10. Organise a free venue if possible and seek local sponsorship
11. Think about your guest list and who to invite
12. Send out invitations to the branch launch
13. Contact Jogeeta Tura, jtura@cilex.org.uk for the branch logo and policy
14. Contact Ellen Birch at ebirch@cilex.org.uk for the branch tablecloth, branch stand, letterheads, business cards for the chair. And branch chair's badge of office. Examples of our literature and order form can be found in Annex G.