



BRANCH and INTEREST GROUP HANDBOOK

learn·share·grow



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Introduction

The New Zealand Organisation for Quality (NZOQ) is an organisation formed to promote the appreciation and application of quality management, quality assurance, quality control and performance improvement in service and manufacturing industries. The aims and objectives of NZOQ are set out in greater detail in the Appendix section C of the NZOQ Constitution.

When you joined NZOQ, you gained access to the Organisation's online connection, network, communication and collaboration tools such as Facebook, Twitter and LinkedIn.

However, you are not necessarily **involved** yet with a Branch in your area. How involved you choose to be is up to you.

More than 400 business people, thought leaders and change agents – all quality professionals – are members for all areas around New Zealand.

NZOQ Branches and Interest Groups can self-organise local discussion groups, site visits, seminars, training events and networking organisations. This is in your hands.

Through NZOQ, members take the tools, i.e keeping your own professional development record, and the networking opportunities offered and use them to make creative change in their careers, organisations and communities.

What you get out of NZOQ is dependent on what you put in to it. As a member of NZOQ, and as a member of a local Branch or Interest Group, you can influence and get involved in what your local Branch does in terms of events, activities and actions.

This guide is to help and support members of NZOQ who have an interest in starting up a local Branch or Interest Group, or for those already involved in a Branch or Interest Group.

The NZOQ Constitution provides for certain rules about how Branches and Interest Groups should be operated. So long as these basic rules are followed (and these are as much to protect members as they are NZOQ), how you operate your Branch or Interest Group is up to the Branch Committee.

This handbook provides guidance and advice to help you on your way.

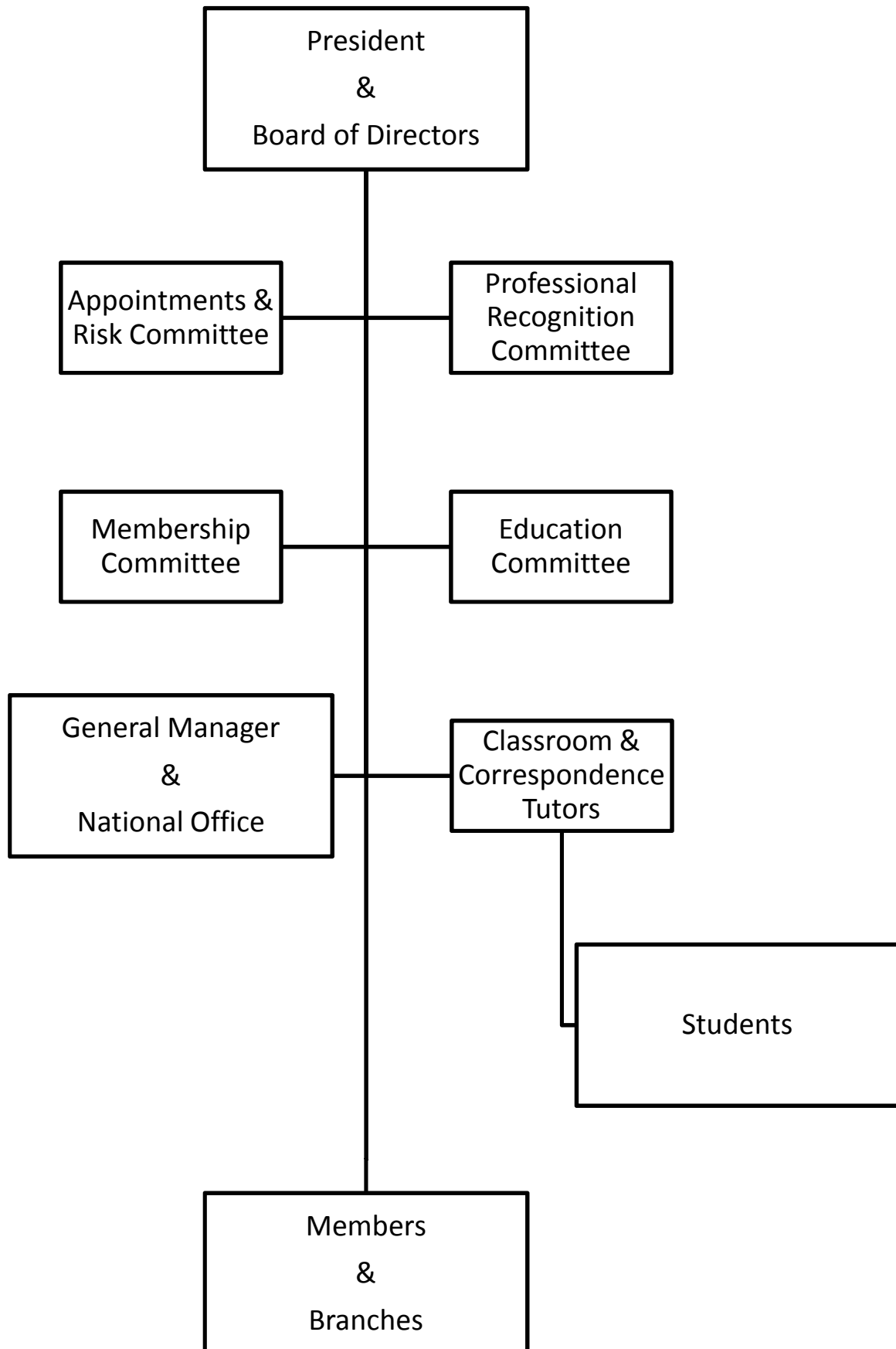
A range of templates is available on request.

I wish you well – whatever level of involvement you have with NZOQ.

Participate, enjoy, learn and grow.

Anthony Stephenson
NZOQ President
2012-2013

The Structure of NZOQ



Code of Ethics

Members of NZOQ subscribe to the following Code of Ethics and endeavour to uphold these Ethics in all of their dealings as a quality professional:

1. To act professionally, accurately and in an unbiased manner.
2. To strive to increase the competence and prestige of the quality profession.
3. To assist those in my employment or under my supervision in developing their management, professional and quality management skills.
4. To declare any conflicting or competing interests and to disclose to any client or employer any relationships that may influence my judgment or the exercise of my professional duties.
5. To discuss or disclose only information relating to an employer, past employer or client as required by law or authorised in writing by the affected party.
6. To refuse any inducement, commission, gift or other benefit from any individual or Organisation in return for making decisions or judgments that may be an advantage to the individual or organisation offering the inducement.
7. Not to intentionally communicate false or misleading information.
8. Not to act in any way that would prejudice the reputation of the NZOQ, the Register of Certified Quality Professionals, the RABQSA, Quality Society of Australia, American Society for Quality and/or any other organisation or organisations with which NZOQ is affiliated, or the Quality Profession, and to co-operate fully with an enquiry in the event of any alleged breach of this code.

Formation of a new Branch or Interest Group

The Board of Directors of NZOQ gives every encouragement to the setting up of new Branches and Interest Groups and will work with people interested in establishing Branches or Interest Groups within NZOQ.

How do Branches and Interest groups start?

Usually a person, or a group of people, step(s) forward as volunteer coordinator(s) and

- search among existing NZOQ members, or among people with a common interest in quality or quality-related issues, in their area; and then,
- contact (via phone, fax, e-mail or in person) the people they find – to introduce themselves, to inquire whether other folks are interested in attending a local get-together, and to express interest in organising and facilitating an NZOQ event.

If people respond favourably, the volunteer coordinator helps determine a suitable date, time and location, by consensus. NZOQ encourages Branches to select free meeting spaces such as people's homes or office meeting spaces, public libraries, schools, colleges and universities, restaurants and cafes.

The first meeting

For the first meeting, don't get hung-up on an agenda. Most new Branches or Interest Groups use their first meeting to meet one another, to get acquainted, and to find common interests. The group can then “suss-out” how future get-togethers will be organised once it's clear that people are interested in meeting again.

Once it is clear that you want to form a Branch or Interest Group, there are certain formalities that need to be followed.

Forming the Branch or Interest Group

The NZOQ Constitution states that subject to the approval of the Board of Directors, any group of members may form a local Branch or Interest Group to engage in activities that further the objectives of the Organisation. Such Branches or Interest Groups are responsible to the Board of Directors and subject to the rules of NZOQ.

Any group of interested people may form a Branch or Interest Group providing they are members of the Organisation or have applied for membership. Although there is no minimum stipulated, for the group to be sustainable it is advisable that it number 8 or more members. They must notify the General Manager at National Office of their intention to form a Branch or Interest Group, plus the date and venue of the inaugural meeting. Initial funding for the setting up of a Branch or Interest Group may be available on written application to the Board of Directors. An indication (in writing) must be given as to how the funds will be spent; all expenditure must be accounted for.

A number of templates are available on request.

Branch or Interest Group committee

A Branch or Interest Group committee should be formed at the inaugural meeting that should consist of a Chairperson, Secretary/Treasurer plus at least three others. The composition of the Committee is at the Branch Policy Handbook 2012

discretion of the Branch and Interest Group members and may, if desired, be a Committee of the whole group but the Committee should comprise a minimum of five persons who must all be financial members of NZOQ.

For Branches and Interest Groups that choose to manage their own finances, they must appoint a Chairperson, a Secretary and a Treasurer. The same person may hold the roles of Secretary and Treasurer.

The Branch or Interest Group committee should give responsibility to one person to liaise with the National Office and ensure that effective two-way communications are maintained.

A brief record must be kept of meetings. As a minimum the record shall include:

- the date, time and location of the meeting
- the names of those present
- decisions made and business transacted
- a record of financial transactions (if any), including formal approval of any accounts for payment.

The Branch or Interest Group may choose to manage its own finances or may elect to have these managed by National Office or by another Branch or Interest Group on their behalf.

Where the Branch or Interest Group elects to manage its own finances it must open a bank account with the Bank of New Zealand and appoint two cheque signatories plus the General Manager to operate the account. Cheque signatories must be financial members of NZOQ. All financial transactions must pass through the bank account.

Where the Branch or Interest Group elects to have its finances managed by another Branch or Interest Group on its behalf, the Branch or Interest Group managing the finances must meet the criteria set out in the NZOQ Constitution and these guidelines. In addition, the Branch or Interest Group managing the finances must maintain sufficient records to be able to distinguish its own financial transactions from those of the Branch or Interest Group on whose behalf it acts.

Branch Activities

If you're interested in how to help coordinate a Branch, here are some examples of activities that Branches or Interest Groups have decided to organise. Remember that these are only ideas and suggestions.

Networking and social events:

This is where most Branches start. These informal gatherings are fun ways to get to know who else is involved in the Branch, what they do, and how they can get more involved in the Branch. Social events such as mixers are important community-building activities, but it's important to remember that NZOQ can do more than provide opportunities to exchange business cards and socialise; chances are you're already involved in other organisations that do that.

If people approach Branch meetings as just another way to network, solicit business, or search for a new job, they won't contribute much to, or get much out of, the Branch. (Some Branches even discourage or shun people who do so.) Nevertheless, frequent social events can help cement ties among Branch members.

Meetings and events:

Many Branches quickly move to larger-scale organised events. These events can be more meeting-oriented, but they can also be events with speakers, panel discussions, and demonstrations.

One of the biggest challenges for some Branches is finding a space in which the group can meet. If Branches aren't able to encourage members to offer up their personal or company's facilities as meeting spaces, someone could research local options at restaurants, libraries, schools, and other locations.

Local businesses might be interested in offering meeting space as well, either as part of a site visit or not. Some Branches encourage their corporate hosts to share a little about their businesses; others dislike any semblance of a sales pitch or promotional speech. Still others offer to help solve a challenge currently facing their host in exchange for the use of the space.

Joint events or meetings covering topics of common interest with kindred or other like-minded organisations (eg NZIM, NZIFST, etc) can be of benefit to the members of both.

It must be stressed that planning of any events where there is a need for NZOQ funds for support will require a strong business case to proceed.

Discussion/Chat groups:

Based on the tradition of salons, or knowledge cafes, the Branch could focus its activities on discussion and reading groups, using magazine articles as a starting point for in-depth conversations about various topics related to quality systems, the new economy, work and life. Recent trends in risk management or integrated management systems for Quality, Environment and Occupational Safety are examples.

The Branch could prepare a monthly discussion packet with several recommended—and related—articles, as well as a questionnaire to help fuel conversation and to act as a to-do list after the meeting. By design, such discussions should be freeform. However, in such events most of the conversation generally follows discussion items on the worksheet. The current content of QNewZ is an excellent forum for discussion.

One highly successful format used by a number of Branches has been the lunchtime Chat Group, whereby members bring their own lunch to a host venue, to discuss and share experiences on a pre-arranged topic.

Site visits:

Site visits are a very popular Branch/Interest Group activity – relatively easy to organise and usually low- or no-cost events. Branches can organise visits to companies and organisations that have a particular quality-related message to share. These visits can be set up by members to their own organisation, or by contacting organisations of interest.

Special Topic Presentations:

Presentations by members and non-members on quality, management or leadership related topics are frequently of interest to members.

Work groups:

As Branches grow and smaller groups within the Branch start to identify more focused topics that they'd like to explore, some Branches splinter into Interest Groups.

In some cases these Interest Groups may meet at the same time, while some groups may meet outside of larger Branch meeting times. These Interest Groups tend to concentrate on a specific theme such as health or software engineering. They might return to the Branch at large, later on, with a special programme (concerning what the group has discovered and learned) – to share.

Interest Groups might also work as ‘master-mind groups’ or creative problem-solving teams in which members propose business challenges and other participants help them solve their individual, real-world problems.

Mentoring:

Branches could organise mentoring activities in which Branch members are paired with each other for peer-to-peer mentoring. Participants could be paired in peer-to-peer mentoring teams, in which people mentor each other. Each team could be paired for a month and then new teams formed. By the end of the year, participants could have benefited from the experiences and formed deeper friendships with 12 other Branch members. These concepts need to be handled with care due to potential industry sensitivities over technology and other commercial factors.

Ideas from other Branches:

Don’t forget that longer-established Branches may well have ideas that you can follow up on in your own locality. Contact the secretary of such Branches through the NZOQ National office.

Building Community

When Branch events attract a large number of new members and some attendees of past events don't return or attend frequently -- forming a solid, long-lasting personal relationships and sense of community can be a challenge. Branches could come up with several activities that help cement community in the network. Here are some examples:

Mentoring:

See above.

Wall of connections:

Hang a flip-chart or a sheet of plastic on a wall, or use a large white-board. Participants post their business cards on this. They then draw solid lines to the people they already know, and dotted lines to people they wanted to meet that night.

Questionnaires and surveys:

Distribute a questionnaire to members to gauge a number of items:

- why people became involved with the group
- what their biggest challenges were (this could include professional, work or quality challenges, or even challenges to joining the Branch)
- how they wanted the Branch structured and events organised
- when they are available to participate in Branch events
- what skills and resources they could contribute to the group

Strategic visioning:

Form a sense of group identity and direction by covering the walls of the meeting room with sheets of paper. Participants write down what they bring to the Branch, what they hope to get out of it and what the group could become.

Branch Organisation

At first, the success of a Branch might depend on the efforts, energy and vision of one person – the volunteer coordinator. But as Branches mature it is possible (and perhaps even wise) to syndicate or distribute leadership.

Most Branches operate under the guidance of a committee, as well as the Branch membership as a whole. These committees share the responsibilities of organising, hosting and running Branch events and activities.

Below is a schedule of the tasks likely to be carried out by Branch or Interest Group office holders. It is not intended to be definitive, but may help in the way you choose to operate your Branch or Interest Group.

Chairperson

<i>Item</i>	<i>Action</i>
Agenda	<ul style="list-style-type: none">• Request items for the agenda 10 days prior to the meeting• Co-ordinate agenda with the host and email to committee members
Notice of Meeting	<ul style="list-style-type: none">• 7 days before the meeting email committee advising of meeting location and include the agenda. Ask for any apologies
Chair Meeting	<ul style="list-style-type: none">• Ensure meeting starts on time and progresses in a timely manner• Observe normal meeting etiquette i.e.: one person speaking at a time
National Office	<ul style="list-style-type: none">• Ensure regular report is submitted to QNewZ or Qzine
NZOQ AGM	<ul style="list-style-type: none">• Prepare and send a report to National Office before the NZOQ AGM (usually May of each year) outlining the previous year's events
Constitution	<ul style="list-style-type: none">• Be aware of the contents of the NZOQ Constitution and Rules (current version 20 June 2006)
Cheques (optional)	<ul style="list-style-type: none">• Be available to countersign any cheques prepared by the Treasurer

Vice Chairperson

<i>Item</i>	<i>Action</i>
Chairperson Support	<ul style="list-style-type: none">• Support the Chairperson and fill in where/when required
Constitution	<ul style="list-style-type: none">• Be aware of the contents of the NZOQ Constitution and Rules

(current version 20 June 2006)

- Cheques (optional)
- Be available to countersign any cheques prepared by the Treasurer

Secretary

Item	Action
Minutes	<ul style="list-style-type: none">• Take minutes at each meeting• Actions to be assigned to at least one committee member with agreed completion dates• Type up minutes• Email minutes to committee members within 7 days after the meeting• Copy minutes to National Office (email: membership@nzoq.org.nz)
Calendar of Events	<ul style="list-style-type: none">• Maintain calendar of events and update committee as changes occur
Correspondence	<ul style="list-style-type: none">• Maintain any correspondence – log both incoming and outgoing
Committee Contact List	<ul style="list-style-type: none">• Maintain and issue committee contact list• Copy to all members and National Office
Cheques (optional)	<ul style="list-style-type: none">• Be available to countersign any cheques prepared by the Treasurer
National Office	<ul style="list-style-type: none">• Keep National Office up to date with current committee and positions• Maintain supplies of NZOQ envelopes, letterhead etc from National Office
eGroup/s & Website	<ul style="list-style-type: none">• Supply information in timely manner to the Web Master through National Office

Treasurer

Details of the financial management requirements for Branches and Interest Groups are shown later in this handbook, but in summary the role of the Treasurer includes:

Item	Action
Financial Statement	<ul style="list-style-type: none">• Provide a statement of accounts at each committee meeting to ratify payments or report any income• Report information to National Office in a timely manner, in particular for the NZOQ AGM
Payment of Invoices	<ul style="list-style-type: none">• Have all invoices ratified for payment• Ensure all invoices are paid by the due date
Cheques	<ul style="list-style-type: none">• Have any cheques for issuing ready to be countersigned• Maintain current signatory information with the appropriate bank
GST Return	<ul style="list-style-type: none">• Prepare GST return as required

- National Office
 - Be aware of National Office responsibilities and applications for Grants, etc

Membership Co-coordinator

This is the primary point of contact in the Branch for new members. This role is essentially the 'welcoming committee' making personal contact with new members, advising them of how the Branch operates and what the activities are. During this conversation the new member can be asked about their interests and how they might be able to contribute to the Branch. This role can also be used to 'exit interview' members who 'leave' the Branch to find out what the member found was good about NZOQ and/or the Branch, and what could be improved.

Item	Action
National Office	<ul style="list-style-type: none"> • Communicate with National Office about Branch members • Obtain and maintain current membership list from National Office
Branch Members	<ul style="list-style-type: none"> • Ensure committee members are official members/delegates to NZOQ
Update Committee	<ul style="list-style-type: none"> • When changes to the membership occur
Contact with New Members	<ul style="list-style-type: none"> • Send letter of introduction within one month of the member joining NZOQ • Ensure all new members are aware of Branch functions and upcoming events and • Direct them to the NZOQ Website www.nzoq.org.nz • Get approval and create Bio/welcome for publication in next newsletter
Promotional Supplies	<ul style="list-style-type: none"> • Maintain forms, posters and banners and have supplies available for use at events
Email Addresses	<ul style="list-style-type: none"> • Ensure all new members, where possible, provide an email address and that this is set-up on the appropriate eGroup
Non Email Address	<ul style="list-style-type: none"> • If member is reluctant or unable to provide an email address, maintain a listing to ensure that the member receives hardcopies of any communications in a timely manner
Non-Renewal of Members	<ul style="list-style-type: none"> • Conduct exit interviews on all members who fail to renew subscriptions with NZOQ

Event Co-coordinator

Many Branches run their meetings and events using a floating facilitator instead of a fixed meeting chairperson. This can be especially useful in smaller, work group-oriented or creative problem-solving settings in which more facilitation or mediation might be needed.

Item	Action
Events	<ul style="list-style-type: none"> • Complete and maintain the Event Checklist for each event • Prepare budget and liaise with Treasurer • Prepare Event Registration Tax Invoice. Consider timing to

meet the QNewZ. Liaise with National Office on this

- Report to committee at each meeting on current status of events, outcomes and evaluation results
- Ensure an article/photos are supplied for QNewZ/Branch newsletter
- Request help from other Branch committee members when required and assign roles

Assistance

In addition to the roles above, members of the committee and other members of the Branch might fill the following roles:

Event Greeter

Members of the Branch could volunteer to greet people at Branch events, to introduce newcomers to the group, and to help new members meet people who have common interests and experiences. They can also help people find the group/meeting at the beginning of events by standing in the lobbies of meeting places, etc.

Events Scribe/photographer:

Someone might want to take notes and capture or document some of the discussion, decisions and actions of the Branch during Branch activities. The same person could also capture the event with photographs or video.

Education Coordinator:

One of the objectives of a Branch may be to co-ordinate education opportunities for the members of the Branch, or to inform members of opportunities coordinated by other organisations or institutions in the locality. Appointing a person on the committee to be a point of contact or organiser has benefits for the Branch/Interest Group.

Branch and Interest Group Annual General Meetings

Each Branch and Interest Group of NZOQ will conduct an Annual General Meeting (AGM) in each year. A written notice of the AGM is to be sent to all Branch and Interest Group members not less than one calendar month prior to the AGM. The notice must include meeting details (venue, date, time), proxy-voting forms and, if necessary, postal voting forms.

The AGM is usually chaired by the Branch or Interest Group Chairperson or in his/her absence a nominated Committee member. Decisions will be by simple majority vote with the Chairperson having the casting vote in the event of equal voting.

The business of the meeting will include:

- apologies
- confirmation and acceptance of the Minutes of the previous AGM
- correspondence
- presentation of accounts
- chairperson's address
- election of Committee members
- discussion of remits and/or proposed amendments to the Constitution

- general business

Branch or Interest Group accounts should be forwarded to the General Manager for auditing.

Financial Management of Branches and Interest Groups

The NZOQ constitution contains a number of provisions relating to the financial management of Branches and Interest Groups.

Branches and Interest Groups formed under the auspices of NZOQ must comply with the NZOQ constitution. Branches and Interest Groups have no standing in their own right. Accordingly, assets of Branches and Interest Groups are assets of the Incorporated Society, NZOQ, and not of the individuals that comprise the Branches or Interest Groups.

Ultimate responsibility for the assets of NZOQ rests with the Board of Directors. In accordance with the provisions of the Incorporated Societies Act 1908, any assets remaining after the winding up or dissolution of the Organisation after the satisfaction of all debts and liabilities shall be transferred or given to some other body or bodies having a purpose wholly or in part similar to the Purpose of the Organisation and shall not be distributed to members of the organisation (see Section 8.11 of the Constitution).

The Board will support and encourage Branch activity to the best of its ability, consistent with the Constitution.

Responsibilities of Treasurers

Each Branch or Interest Group that intends to handle its own finances must appoint a Treasurer who is responsible for:

- maintaining a ledger of all income and expenditure transactions and identifying all GST payments and receipts;
- preparing a financial statement for the Branch or Interest Group to be presented to the Branch or Interest Group AGM;
- working with National Office in preparation for the annual financial audit
- supplying National Office with details of GST transactions for consolidating into the GST return to the Inland Revenue Department; returns must be received by the 15th of the month in which they are due;
- forwarding copies of the Annual Accounts from the Branches and Interest Groups to National Office;
- opening and/or maintaining a bank account with a bank approved by the Branch or Interest Group's Committee. All payments and receipts shall pass through this account. All cheques drawn on this account should be signed by at least two signatories who shall be appointed by the Branch or Interest Group Committee;

- sending surplus monies above \$2,000 to National Office for investment by the General Manager. In exceptional circumstances Branches may hold sums above \$2,000 in their accounts but the reasons for this should be explained to the Board of Directors;
- reimbursing expenses: Branch or Interest Group Committee members may claim reimbursement of travel and reasonable out-of-pocket expenses. Where travel is by private car, Committee members shall be reimbursed at the rate defined by the IRD that does not incur a fringe benefit taxation liability. Where public transport or rental cars are available and are more cost-effective they shall be used or the private vehicle reimbursement limited to what these alternatives would have cost. Where practical a GST invoice made out to NZOQ by the organisation providing the service shall accompany claims for expenses.

Retention of Financial Records

There is an obligation under both the Incorporated Societies Act and the Inland Revenue Regulations for NZOQ to retain all financial records for a period of up to ten years.

Branches and Interest Groups are required to return all financial records, including Annual Accounts, receipts, payments, bank deposit slips and invoices to National Office after the approval of Annual Accounts at the AGM. National Office will then retain the records for each Branch and Interest Group for the statutory period.

Winding-up of Branches and Interest Groups

When a Branch or Interest Group ceases to be viable, the office holders must advise Head Office in writing. All assets (including cash and bank balances) are the property of NZOQ and must be returned to the Organisation's National Office. The assets may not be distributed to members.

If your Branch has reached a stage where dissolution is possible you should contact the General Manager for advice on how to proceed.

Membership

New Members

It is a responsibility of all members to introduce new members to the Organisation. All prospective members will be presented with a Membership Application Form and a list of services to Members provided by the Organisation.

Applicants for NZOQ membership will forward completed Membership Application Forms to the National Office, which will record the personal details of the applicant into the NZOQ Membership database, and will notify the Branch or Interest Group of new membership applications received from their area.

Fees accompanying the application will be deposited as soon as possible and a receipt issued to the new member. Where the applicant has asked to be billed for fees, an invoice is issued and membership is conditional upon the payment of this invoice.

After payment, the National Office will issue the new member with the Organisation badge, membership card and certificate, a copy of the Constitution and the latest copy of QNewZ and send other information as from time to time is appropriate.

Membership Records

The National Office Membership administrator will ensure that membership records are complete and up-to-date and include, at least, the following:

- Member number and type
- Member name, position and department
- Name of Company/Organisation and postal address
- Phone & Fax numbers and E-mail address
- Branch or Interest Group
- Fee status.

The current membership list will be available to Branch or Interest Groups through a secure login on the Organisation website, www.nzoq.org.nz, or upon request, but membership lists are not provided to outside organisations or individuals.

All NZOQ membership information is subject to the NZOQ Privacy Policy and New Zealand Privacy Legislation.

Branch members

After signing up for the NZOQ membership, members can formally associate with a Branch or Interest Group of NZOQ members. Associating with a Branch gives members direct access to that Branch's calendar of current events, archive of minutes and notes, and directory of local members. It also adds members to the mailing list which the Branch committee uses to announce Branch events and activities and distribute Branch-specific news and notes.

Branch coordinator

If there is not a Branch in your area when you sign up for membership of NZOQ, you can help start one. This handbook can help you do so.

Initially, Branch coordinators serve as organisers, facilitators and leaders. But as Branches mature, many groups opt to follow a distributed or syndicated leadership model in which a committee handles the Branch logistical operations and scheduling. Then the coordinator might become a floating role serving as a point of contact for new members.

Coordinators, and other leaders, can establish and maintain the calendar of events, add event reports to the archive of minutes and notes, and e-mail everyone associated with the Branch (whose e-mail address is known).

Branch members can do a lot of work, and learn a lot, within the Branch. NZOQ Branches and Interest Groups are organic, self-organising and evolving building blocks for NZOQ as a whole.

National Office Responsibilities

Assistance to Branches

The Membership Services Administrator will assist the Branches by:

- providing them with an updated list of members in their area;
- reconciling Branch accounts ready for the Annual Audit with the help of the Branch Treasurer;
- accepting registrations for Branch events when necessary;
- assisting in promoting and organising (if necessary) Branch events.