



Volunteer Role Description

Branch Volunteer Role Description

Volunteer Role:	Regional Branch Committee Member
Reports to:	Branch Chair
Version date:	01 08 2023

Volunteer Role Purpose

To support the Chair, fellow committee members and the charities aims by:

- Being a local ambassador for the CIOT and ATT
- Attending branch meetings
- Attending branch events
- Carrying out agreed actions set by the branch
- Making decisions as a collective group and hold joint responsibility for decisions and actions taken by the branch
- Ensuring that all decisions are taken in the best interests of the Institute and Association
- Declaring all real, or perceived, conflicts of interest to the Branch Chair
- Contributing ideas for content for the branch programme
- Suggesting speakers for branch events
- Providing ideas, contacts, connections and suggestions for partnerships in the UK and Internationally with other organisations, professional bodies and firms

Benefits of Volunteering with the Branch Network

- Substantial increase in knowledge of tax
- Growth in skills, diplomacy, delegation, communication and meeting management
- Forming relationships within the profession around shared interest
- Meeting interesting people with different views from around the UK working in tax
- Complimentary attendance at up to 4 branch webinars across the entire programme
- Free attendance at Branches Conference, includes professional skills training and volunteer training (normally in Warwick in late February)
- Free attendance at Branches Forum, includes induction sessions for new volunteers, updates on relevant governance and other professional activities
- All reasonable travel, accommodation and subsistence expenses are claimable under our Volunteer Expenses Policy

Commitment

- Meetings are generally once every two months for 1 hour
- Attendance at branch volunteer events, in person and online (around 3 per year) is not obligatory but is strongly encouraged (accepting the volunteer induction which is mandatory)
- Failure to attend events or meetings routinely without good reason can sometimes be deemed as a failure to fulfil committee member duties leading to the role ceasing

Contextual Information

Aims and Objectives

The aims and objectives of the Branch Network are as follows:

The aims and objectives of the Branch Network is to support the delivery of the charitable objects of the Chartered Institute of Taxation and the Association of Taxation Technicians by undertaking activities in line with its charitable objects and in furtherance of the public benefit.

This will be achieved by:

- the delivery of public events to further the public education of taxation matters
- the delivery of accessible, inclusive, high quality and affordable CPD, and
- bring the profession together as a community via peer-to-peer learning and networking

Functions of a Branch

The functions of a branch are to put into practice at a local level the charitable objects of the Chartered Institute of Taxation and the Association of Taxation Technicians including:

- a. advancing knowledge and learning in taxation
- b. encourage and promote the study of taxation and to educate members of the public in taxation matters
- c. organising and holding conferences, meetings and assemblies to provide a forum for the discussion and dissemination of relevant information on taxation matters
- d. providing a forum for individuals who are members of the Chartered Institute of Taxation or the Association of Taxation Technicians, and
- e. Maintain good relationships with other bodies locally (e.g. HMRC, ICAEW, ACCA, AAT, STEP, local Chamber of Commerce)

Branch Strategy

There will be a new branch strategy which will set out medium to long-term plans to achieve the aims and objectives of the Branch Network. The roles of Council, Membership and Branches Committee and Joint Branches Subcommittee will be as follows:

- a. The Joint Branches Subcommittee will deliver the agreed strategy,
- b. The Membership and Branches Committee will oversee the strategy, and
- c. Council will receive regular reports and will ensure that there are appropriate resources to realise that strategy (or make amendments to the branch strategy as necessary)

Framework & Boundaries – The Provision of Policy and Guidance

Two categories of policy are relevant to the Branch Network; corporate policies approved by the CIOT and ATT (e.g. Speaker Payment Policy and Volunteers Expenses Policy) and policy or guidance specific to the Branch Network (e.g. GDPR for branches, code of conduct etc.)



With regard to branch policy and guidance that will be drafted by the Executive and approved by Joint Branches Subcommittee. The Branch Network Team are responsible for operational matters and may also issue supplementary guidance on any area relevant to the Branch Network.



Values and Behaviours

The role of the committee members of a branch, to be consistent with the role of committee members of the institute is as follows:

- Attend branch meetings
- Attend branch events
- Carry out agreed actions set by the branch
- To make decisions as a collective group and hold joint responsibility for decisions and actions taken by the branch, even in their absence
- Ensure that all decisions are taken in the best interests of the Institute and Association and that their role is carried out effectively, and
- Declare all real, or perceived conflicts of interest to the Branch Chair

Duty to Escalate Risks to the Charity

Should any Branch Officer or Branch Committee Member believe that the branch is operating beyond its remit or powers, contrary to any guidance or believe in any way that the activities of the branch may cause a reputational, or other, risk to the Chartered Institute of Taxation or the Association of Taxation Technicians, they must immediately contact the Head of Member Services.

