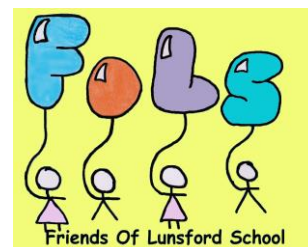


# FoLS Committee Roles & Responsibilities – Chairperson



The explanation of roles and responsibilities is to be used as a guide only. Where a role has specific responsibilities as outlined in the constitution, they are indicated by being in *italic script*. Vice roles can be held by an existing Committee Member.

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## Chairperson – Required Committee Position

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### To Provide Leadership

The overarching role of the chairperson is to provide leadership. The chairperson must be an effective strategist and a good networker. The Chairperson must make the most of all his/her committee members, building and leading the team.

### To Ensure Effective Meetings Are Conducted

*Make sure each meeting is planned effectively, conducted according to the constitution and matters are dealt with in an orderly, efficient manner.*

### To Ensure The Committee Functions Properly

Making the most of committee members whilst building and leading the team. This also involves regularly reviewing the Committee's performance and identifying and managing the process for renewal of the Committee through recruitment of new members.

### To Ensure The Association Is Managed Effectively

Coordinate the Committee to *ensure appropriate policies and procedures are in place for the effective management of the association*. Adjustments of Committee positions may be necessary to ensure effectiveness of the association.

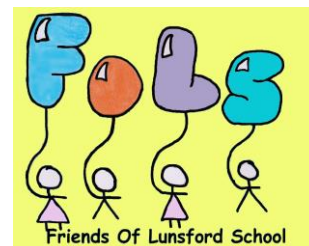
### To Provide Support And Supervision For Other Committee Roles

The roles in a Committee may, from time to time, need further support or supervision. The Chairperson is responsible for ensuring any difficulties experienced by another Committee role are effectively managed, supporting the Committee member in the most appropriate way. *Assisting with committee role responsibilities is integral to ensure no one is under undue pressure to complete tasks.*

### To Represent The Association As Its Figurehead

From time to time the Chairperson may be called upon to represent the association and sometimes be its spokesperson at events, functions and meetings etc.

# FoLS Committee Roles & Responsibilities - Treasurer



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## Treasurer – Required Committee Position

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### To Manage The Charity Registration

*The Treasurer is responsible for the keeping of financial records and the preparation and transmission of Annual Reports, Annual Returns and Annual Statements of Accounts to the Charity Commission.*

### To Have A General Financial Oversight

Maintaining a good working knowledge of the association's finances is paramount whilst also negotiating and locating the best deals on purchases. *The Treasurer shall keep abreast of assets, income and expenditure, including keeping records of details of persons paying any voluntary contribution and any other information to enable to association to claim Gift Aid.* Being aware of the current and future financial status of the association is vital bearing in mind budgeting for upcoming and projected expenses or agreed future purchases.

### To Manage Funding, Fundraising And Sales

Count and bank cash received for all events, large amounts require 2 people for openness. Keep and maintain the account cheque and paying in books. Arrange for paying in of funds raised and how funds are retained and spend based on any allocation restrictions attached to them.

Manage online accounts and membership of fundraising sites such as Easy Fundraising, AmazonSmile, Hive Lotto (soon to be closed), Stamptastic and PayPal (open account but not used). To follow up payments due to the association from applications for fundraising.

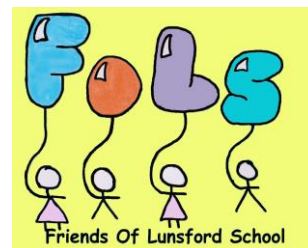
### To Complete Financial Reports

*The Treasurer shall prepare and submit audited accounts at AGM's, with accounts made up to 31<sup>st</sup> August in each year.* The Treasurer shall also submit gift aid claims to HMRC.

### To Conduct Banking, Maintain Book Keeping And Complete Record Keeping

Manage bank accounts and keep bank statements. Monitor and arrange online payment for purchases. Pay invoices for goods/services and arrange refunds for expenses. Set up new payee details and arrange for authorisation of payments whilst maintaining paper receipts and invoices/bills etc.

# FoLS Committee Roles & Responsibilities - Secretary (Required Role)



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## Secretary – Required Committee Position

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### Central Point of Reference

Given the following responsibilities, the Secretary often acts as an information and reference point for the Chairperson and other committee members. This includes clarifying past practices and decisions, confirming legal requirements and retrieving relevant information and documentation.

### Manage Meetings, Including Committee, AGM's and EGM's

The Secretary can book suitable venues for meetings *ensuring the date, time and location is publicised at least 21 clear days in advance (14 days for Association Meetings). Notice of the agenda is given at least 7 clear days ahead of the scheduled meeting.*

An attendance log at meetings is to be completed, enabling the legal position in relation to a Quorum to be proven and any meeting to continue with the terms of a Quorum satisfied.

Note taking by the Secretary is required during meetings for completion of the minutes. *The detailed minutes are distributed to committee members, on request, ahead of the next scheduled meeting and approval sought at the commencement at that next scheduled meeting. Once approved, the minutes are to be published on Lunsford School's website ahead of any subsequent meeting.*

### Maintain Effective Records and Administration

As well as managing meetings, the Secretary *ensures the committee comply with the requirements of the Charities Act 1993 as amended by the Charities Act 2006 relating to the keeping of financial records, the audit or independent examination of accounts and the preparation and transmission to the Charity Commission of Annual Reports, Annual Returns and Annual Statements of Accounts. Annual Reports and Statements of Accounts relating to the association must be made available for inspection by any member of the association.*

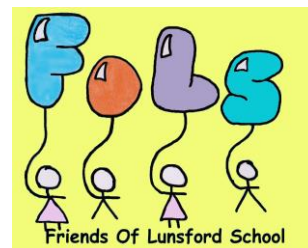
*Annual Reports are to be made available for publishing on Lunsford Primary School's website.*

Developing and maintaining a suitable filing system for documents and all correspondence will enable the production of information as requested. Monitoring the level of stock for the association is important, raising orders for items as required.

### Retention of Information

File and update contact details for members and the committee, as well as suppliers and external organisations connected with the association. Ensure data held is relevant and accurate whilst considering the principles of GDPR.

# FoLS Committee Roles & Responsibilities - Events Coordinator



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## Events Coordinator – Optional Committee Position

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### Planning Of Prospective Events

Proposals for future events require research to create a viability report. The Events Coordinator will consider staffing and fundraising opportunities together with suggested dates of events to assess this viability. The report will be presented at a committee meeting where agreement can be reached for events which can be effectively managed.

### Management Of Events

For an event to be a success it must provide value for money for attendees whilst yielding a worthy return for the costs and effort expended. Each event must meet or exceed the expectations of attendees and encourage community connections. To achieve this, management in various areas of an event is key, including refreshments, entertainment, seating/site plans, staffing rotas and evaluation of success afterward. All members of the committee will support organised events, completing tasks as designated by the Events Coordinator.

### The Main Functions Performed

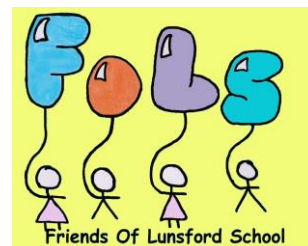
- Booking of venue, entertainers, photographer and suitable refuse facilities.
- Arrange staffing, ensuring suitable breaks are factored in.
- Raise purchase orders (refreshments/prizes/gifts/events equipment)
- Manage and collate donated items, ensuring thanks are given before/after the event.
- Manage suitable publishing/advertisement of the event whilst inviting relevant community connections.
- Manage the event set-up, clear down and follow-up processes.
- Maintain event budgets.
- Conduct final inspections on the day of the event, ensuring everything is in place and suitably supervised.
- Assess an event's overall success and submit findings.

### Team Management

The Events Coordinator is a role which is likely to require additional assistance from others. Whilst support is provided from other committee members it is also understood an Events Sub-Committee may be required. The Events Coordinator, will manage any such team

whilst ensuring any team meetings are recorded, documented and meeting minutes made available to

# FoLS Committee Roles & Responsibilities – Fundraising Coordinator



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## Fundraising Coordinator – Optional Committee Position

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### To Provide And Manage Fundraising Opportunities

The overarching role of the Fundraising Coordinator is to seek and research fundraising opportunities & grants and effectively manage that fundraising. All members of the committee will support fundraising opportunities, completing tasks as designated by the Fundraising Coordinator.

### Main Fundraising Coordinator Responsibilities

The role of Fundraising Coordinator also includes;

- Publicising how funds can be obtained with minimal effort for participants, eg. match-funding, charity sponsorship, gift aid and voting for grants applied for.
- Set out clear objectives for fundraising, the overall goal.
- Monitor progress of fundraising drive initiatives.
- Produce corporate applications for grant funding.
- Develop strategies to encourage new or increased contributions.
- Create and maintain donor and grant databases, building relationships and ensuring future fundraising is done more efficiently.
- Assess and produce a report on all fundraising initiatives, highlighting success, potential improvements and giving thanks to participants and donors.
- Produce updates on grants or fundraising efforts, fully explaining where fundraising efforts have provided benefit to Lunsford Primary School.
- Look for opportunities where fundraising can be achieved by teaming up with other organisations. Perhaps liaise with other similar charities to discuss their practices and tried and tested events. There may also be opportunities to pool resources.

### Team Management

The Fundraising Coordinator is a role which is likely to require additional assistance from others. Whilst support is provided from other committee members it is also understood a Fundraising Sub-Committee may be required. The Fundraising Coordinator, will manage any such team whilst ensuring any team meetings are recorded, documented and meeting minutes made available to the Secretary for publishing in line with the association's constitution.