

## Branch Secretary Role - Overview



Hello, and welcome to this training session for Branch Secretaries.

### **Learning Goals**

By the end of this session, you will:

- Understand how the role of Branch Secretary contributes to the work of Butterfly Conservation.
- Have some general tips for carrying out your role.
- Know where to go for help and information.
- Know how to keep yourself safe in this role.



Thank you very much for supporting us in this key role.

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## Branch Overview

There are 32 branches in the UK, directing local activities to help save butterflies, moths and the environment.

Branches are run entirely by volunteers and their work is directed by a committee.

The committee is led by the Branch Chair and should also have a Branch Treasurer and Branch Secretary as a minimum.

Other key volunteers lead groups or key activities.



Many of Butterfly Conservation's volunteers support us through one of our 32 branches in the UK. These branches direct local activities to help save butterflies, moths and the environment. Some branches align to county boundaries and others span several. In Northern Ireland we have one branch which covers the entire country. They were all established by volunteers and many have been running for 30 or 40 years.

Branches are run entirely by volunteers and their work is directed by a committee.

The committee is led by the Branch Chair and should also have a Branch Treasurer and Branch Secretary as a minimum. Many committees have additional people joining them, such as Volunteer Conservation Advisors and those who carry out engagement, communication or publicity work.

In addition, most branches have people in other key roles, who don't always sit on the committee. This is covered in more detail in a separate presentation on branch structures.

The Branch Volunteer Co-ordinator has a key role in helping the branch to work in the

local area. They are well integrated within the branch and soon learn who to direct queries to when they come in.

### **Role Purpose**

The Branch Secretary is one of three core roles in a Butterfly Conservation branch. The purpose of the role is:

- To support the Branch Chair in planning and running committee meetings.
- To help the Branch Chair ensure that the Branch meetings and actions follow the Branch Guidelines and the policies of Butterfly Conservation.
- To manage all paperwork and records associated with committee meetings.



This key role helps the local branch to run smoothly and therefore supports conservation action in your area.

As mentioned, the Branch Secretary is one of three core roles in a Butterfly Conservation branch. The purpose of the Branch Secretary is:

- To support the Branch Chair in planning and running committee meetings.
- To help the Branch Chair ensure that the Branch meetings and actions follow the Branch Rules and the policies of Butterfly Conservation.
- To manage all paperwork and records associated with committee meetings.

## Branch Guidelines

One of your responsibilities is to help ensure that the Branch follows the Branch Guidelines. They can be found on SharePoint under "[Running a Branch](#)".


- The committee must have a minimum of three persons, made up of a Chair, Secretary and Treasurer.
- Branch committee Members are eligible for re-election every three years.
- Meetings may be held as often as the committee feels necessary.
- The Branch committee are to keep meeting notes and a copy of these need to be sent to [Branches@butterfly-conservation.org](mailto:Branches@butterfly-conservation.org) within six weeks of the meeting.
- All decisions should be made by a show of hands, with the majority being in favour.
- The Branch committee has the authority to distribute the Branch funds, in accordance with the Branch Guidelines.



All branches must follow Butterfly Conservation's policies and processes, and one of your responsibilities is to help ensure that the Branch follows the Branch Guidelines and the policies of Butterfly Conservation. These mostly relate to how the branch works with Head Office, how the committee is structured and run, and supports the branch in following Butterfly Conservation policies and processes.



Some key points included in the Guidelines are listed on the slide.

Please familiarise yourself with the guidelines so you can answer any questions which come up around these during committee meetings. If you have any questions or are unsure of anything, please email [branches@butterfly-conservation.org](mailto:branches@butterfly-conservation.org) and they will help.



**Arranging Meetings**

1. Agree who needs to attend and some suitable dates.
2. Agree on a venue
3. Book the venue and arrange payment.
4. Let attendees know where and when the meeting is happening
5. Agree the agenda
6. Share the agenda




As part of this you may be asked to arrange branch meetings or other events. Here are some steps to follow to help you do this:

1. Agree who needs to attend and some suitable dates. Doodle polls work well if you're trying to find a date which works for several people (<https://doodle.com/free-poll>). They're easy to set up and use and make it much easier to see which is the best date for a group of people.
2. Agree on a venue. We would suggest you check that it is suitable for a wide range of people – for example, is it a comfortable temperature? Can people with limited mobility easily access it? It is accessible via public transport? Some tips on using Zoom will be covered on the next slide.
3. Book the venue and arrange payment. The Branch Treasurer will be able to advise on how payments are made. If you don't have a Treasurer then the Chair may be able to help, or alternatively, please email [finance@butterfly-conservation.org](mailto:finance@butterfly-conservation.org).
4. Let attendees know where and when the meeting is happening. For

larger meetings where you want to know how many people are attending, or restrict attendance, we would recommend using Eventbrite to register people onto the event. A user guide for this can be found on the Branch Secretary training page.

5. Agree the agenda. This is usually done with the Chair of the meeting. You may also wish to involve other branch volunteers in setting the agenda – for example by emailing all committee members when you start to write it to ask if anyone has anything they'd like to add to it. It's good practice to send the agenda out when people are invited to the meeting so they know what it relates to. If this isn't possible, then try to give people a couple of weeks to read the agenda ahead of the meeting – or one week as a minimum.







**Practical Considerations**

It's important to keep yourself safe.

Check venues are suitable for a wide range of people.

Check out the [tips for avoiding gatecrashers on Zoom](#)

Look after people's personal information.



This role is based at home, apart from the times when you may need to attend meetings in person, at a venue agreed with the committee. It's your responsibility to ensure that the area you are volunteering in at home is safe, but you might find it useful to check Butterfly Conservation's standard risk assessment for Working At Home to ensure you have a safe environment for volunteering in. This is linked from the Branch Secretary training page.

If you're using Zoom for meetings it's worth checking whether the branch maintain an account for this, as free Zoom accounts can only be used for 40 minutes at a time if more than two people attend. Zoom also provide some guidance on how you can set the meeting up to reduce the chance of uninvited attendees joining. The link to this is on the slide and can be accessed from the text version of this training. Please contact [branches@](#) if you need any support with this. If you are arranging a meeting with a large number of attendees you may wish to use Eventbrite to manage the registration process. Please see the Branch Secretary training page for guidance on this.

Finally, remember that any meeting minutes may be published to a wider audience, and will also be shared with staff at Head Office, so be careful not to

record any personal information about an individual, such as details of an illness or injury, confidential information about donations or complaints or a persons reasons for stopping volunteering. It would also be good practice to make sure that all committee members are aware that the minutes will be published (if applicable) and shared with Head Office.

### Writing Minutes

- The Branch Secretary would usually write minutes of branch committee meetings and the Branch AGM, if one takes place.
- A link to a video about writing minutes is included on the Branch Secretary training page.
- Make sure you have a template or previous copy of the minutes to work from.
- Agree who signs off the minutes. Completed minutes should be sent to [branches@butterfly-conservation.org](mailto:branches@butterfly-conservation.org) within 6 weeks of the meeting.



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A link to a video about writing minutes is included on the Branch Secretary training page.

The Branch will usually have their own template for minutes. The previous Branch Secretary or Chair may be able to provide this, or you could check the branch website or contact [branches@butterfly-conservation.org](mailto:branches@butterfly-conservation.org) to check if Head Office hold copies of previous minutes.

Once you have a copy of some previous minutes, you can usually create a new copy for the current meeting, delete the content from the old meeting and write your updated minutes using the same headings and layouts as in previous meeting minutes.

When you've finished drafting the minutes, the Chair would usually review them. They may make some suggestions of things to change - you can agree between you how you go about doing this. Once you're both happy, it's usual

to send them to the rest of the committee to review and sign off, and then forward the final version to branches@. This should take place within 6 weeks of the meeting. Head Office will alert any staff if they are mentioned in the minutes, to ensure that any actions can be followed up appropriately.

## Help and Support

Help is available from a number of places:

- Volunteering web pages / Branches SharePoint
- Branch Chair and committee
- Branch Support Officer - email: [Branches@butterfly-conservation.org](mailto:Branches@butterfly-conservation.org)
- Phone: 01929 400209
- Branch Secretary Drop-in Sessions



Help and support is available from a number of places. The Butterfly Conservation volunteering web pages have a wealth of information to support you in your role, as does the Branches SharePoint site. If you're having problems accessing SharePoint, please contact IT, by emailing [itdepartment@butterfly-conservation.org](mailto:itdepartment@butterfly-conservation.org).

Your Branch Chair is your key contact and first port of call if you have any queries about how the branch is run. If you need any additional support, or have any questions about training, policies, processes, documentation or the way Butterfly Conservation and branches work together, please contact the Branch Support Officer – [branches@butterfly-conservation.org](mailto:branches@butterfly-conservation.org)

Any member of staff at Butterfly Conservation can be contacted by ringing 01929 400209.

Finally, we run quarterly drop in sessions for Branch Secretaries. You can book onto these by emailing the Branch Support Officer using the branches@ email address.

Thank You!!!



That's everything! Thank you so much for supporting Butterfly Conservation as Branch Secretary, and for your time in completing this training. Please complete the Training Recap once you've reviewed all the materials and most importantly, enjoy your volunteering!