



## **ANNUAL GENERAL MEETING**

**NORTH COTSWOLDS & TEWKESBURY LIBERAL DEMOCRATS**

**7.00pm, Friday 29<sup>th</sup> November 2024**

**Kings Head, Bishop's Cleeve**

### **AGENDA**

1. Welcome & Apologies
2. Officer Reports
  - Chair's Report
  - Treasurer's Report
3. Election of Officers and Executive Committee for the year of 2025:
  - Chair
  - Vice Chair
  - Secretary
  - Treasurer
  - Membership Development Officer
  - Fundraising & Events Officer
  - Data Officer
  - Diversity Officer
  - Communications Officer
  - Ordinary Member x 4
4. Launch of the 500 Club

# **North Cotswold & Tewkesbury Liberal Democrats**

## **Party Officer Role Descriptors**

### **Chair**

The Chair's role is to provide guidance and leadership to the local party executive. The Chair is accountable for ensuring the local party meets legal and party requirements.

Key Responsibilities:

- Chair the Local Party Executive meetings.
- Take responsibility, with the Treasurer, to make sure that there is compliance with legal requirements, including GDPR.
- Ensure the Local Party is run according to the local & national party constitution.
- Ensure that candidate selection takes place and is carried out according to the rules in the Local Party constitution.
- Ensure that the Local Party has an action programme and is working to fulfil it.
- Ensure that all Executive members have the opportunity and are encouraged to be involved in delivering the Local Party's objectives.
- Handle complaints and be involved in any disciplinary matters, should they arise.
- Actively develop other members of your local party, with a view to them becoming officers in future.
- Develop a good working relationship with local MPs, PPCs, Council Group Leaders.

Time Commitment: 6-8 hours per week

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### **Vice Chair**

The Vice Chair is a position that has strategic value to any party. The interpretation of the role of Vice Chair allows more flexibility than some of the office roles.

Key Responsibilities:

- Chairing meetings fairly and effectively when the Chair is unavailable.
- Taking the place of the Chair to act on behalf of the local party, for example in contacting members of the Executive Committee re. decisions on an urgent matter.
- Advising the Chair, for example acting as a sounding board.
- Helping the Chair when they have difficulties, for example offering to take on some tasks when the Chair has too many; or advocating the Chair's perspective on matters during meetings; or speaking in support of the Chair when necessary.
- Undertaking specific tasks. This is a matter of local discretion. It will take into account the aims of the local party, as well as the Vice Chair's skills and experience.

Time commitment: 1-5 hours per week

## Secretary

The role of local party Secretary is to ensure that the party functions effectively and in accordance with the local, regional, national and federal party constitutions. The Secretary ensures that the processes and rules laid out in the constitution are enacted, and that the decisions made by the local party's executive committee are constitutional.

Key Responsibilities:

- Arrange executive meetings, including circulating the agenda.
- Minute executive meetings and ensure an accurate record of them is kept, especially the decisions and agreed actions.
- Arrange the local party AGM.
- Ensure decisions are consistent with constitutional requirements.
- Make arrangements for election or selection of local executive officers and party candidates, and ensure that these are done in line with proper procedure.
- Efficient handling of general administration, including correspondence with Lib Dem HQ, and keeping records of local party officers up to date.

Time Commitment: 10+ hours per month

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## Treasurer

The Treasurer's role is to have strategic ownership of expenditure and income, such as preparing budgets and financial targets for discussion by others and advising on the implications of spending decisions. The treasurer is also responsible for the practical side of managing the local party's finances, such as paying in bills, and producing financial reports.

Key Responsibilities:

- Prepare a budget for the year.
- Prepare reports for monthly or bi-monthly Executive Meetings, regarding account, income and expenditure.
- Submit monthly donation reports to the national party in line with PPERA rules.
- Complete end of year accounts, and submit them to Party HQ.
- Ahead of elections, work with the campaign team and the Agent to agree budgets for the Agent to stick to during the campaign. The Agent is responsible for campaign spending during the campaign.
- Be responsible for any banking requirements.

Time Commitment: 2-3 hours per week

## Membership Development Officer

The main point of contact for most members, making sure that they are involved with the Lib Dem community where you live. Keep your members up to date with their payments, and are the local party lead on recruiting more members.

- Ensure all membership data from Lighthouse is reconciled with Connect and matched to an electoral roll record where possible.
- Check Lighthouse on a regular basis to identify new members in your local party.
- Send an initial email from local party to all new members when they join.
- Ensure personal contact (phone/doorstep) is attempted with all new members and details about them are recorded on Connect.
- Communicate regularly with members by email and post (and maintain accurate contact details to enable this).
- Aim for all members to be personally contacted on at least an annual basis, and record the data on this interaction.
- Encourage local members to get involved in campaigning
- Monitor lapsing members each quarter
- Be the local party's lead person for recruiting new members.

Time Commitment: 3-4 hours per week

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## Data Officer

Data Officers typically have logins to at least one of up to three databases which the party uses. In context of campaigns and elections, the Data Officer supports the local party and candidates to use data effectively and intelligently, to run targeted campaigns.

Key responsibilities:

- Manage your local party's campaign data, using Connect.
- Manage your local party's membership data, using Lighthouse.
- Manage email lists.
- Manipulate and use data for local campaigns, and produce data as required.
- Ensure that data is processed in accordance with the party data protection rules.
- Collect marked registers and oversee the data work involved after each election.

Time commitment: 2-3 hours per week

## **Diversity Officer**

The Diversity Officer needs to be someone in the local party that has a passion for people and is supposed to bring in diversity to the party with the aim of making the local party more relatable to the community. This can be a fun role as they get to learn about the local community and the many different groups that give it its diversity. The officer will be educated about these groups, and prepared to learn about their concerns, in order to help the exec group take them into consideration in key discussions.

Key Responsibilities:

- Make a list of the groups in your community, including charities in your area.
- Make contact with all of these groups, and arrange to go to their events and meet their management teams.
- Share details of diversity events in your area on your social media pages.
- Invite these groups to attend your local party events, so that they can educate your members.

Time Commitment: 2-3 hours per week

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## **Fundraising & Events Officer**

Fundraising is key – as it enables more resource and better quality output, and helps to make a bigger impact, match your opponent and optimise your result. The Fundraising & Events Officer takes on the challenge of developing additional income to increase the local party's resources to maximise campaign output, and to therefore optimise electoral results. A key aspect of the role is overseeing a regular calendar of events across the year that brings members and supporters together, in order that they can build up string networks, as well as directly supporting the fundraising objectives of the local party.

Key responsibilities:

- Champion the fundraising drive and goal.
- Bring together and motivate a small team to develop and lead events for members.
- Steer and coach the candidate(s), so they can help generate money too.
- Identify or garner potential donors, then steward relationships with those donors.
- Oversee fundraising appeals and asks.
- Complete goals and stimulate new ideas.

Time Commitment: 2-4 hours per week

## **Communications Officer**

The Communications Officer works to share the local party's activities and achievements to its membership, and to the local community. This helps develop the party's reputation, but crucially it keeps members in touch with what the local Liberal Democrats team is campaigning for and working towards. This means that local members and supporters are better informed, and feel better able to get involved with the work of the local party.

Key Responsibilities:

- Develop and deliver a strategy for communicating with local members across all the Party's comms channels (inc. website; social media; regular newsletters etc)
- Communicate all achievements as effectively as possible to members in a timely manner.
- Seek to get the messaging published in the local media by writing and issuing press releases.
- Inform the press of events that they can report about, by writing and sending operational notes.

Time Commitment: 3 hours per week

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## **Executive Committee Member**

The party has 4 people elected to the Executive Committee as Ordinary Members, who do not hold specific roles. These are people who help by having a say in how the local party is run, and by taking on ad hoc roles and to help with special projects.

Key Responsibilities:

- Attend and participate in regular meetings, evaluating agenda items and voting on them.
- Scrutinise suggestions and decisions made by others.
- Offer your time to assist with tasks.
- Be an approachable face in the local party for other members who want to become more involved.
- Communicating the work of the committee to interested parties.

Time Commitment: Ad hoc



**North Cotswolds & Tewkesbury Liberal Democrats**

**Nomination for Executive Committee**

Name of Candidate:

Membership number:

Position applied for:

Address

Phone:

Email address:

*I agree to be nominated for the above post:*

..... (Signature of candidate)

**Nominated by**

Candidates must be proposed and seconded by any two current members of the North Cotswolds & Tewkesbury Liberal Democrats:

Proposer:

..... (Name in block capitals)

..... (Signature of Proposer)

Secunder:

..... (Name in block capitals)

..... (Signature of Secunder)

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