

The Role of Tenants and Residents Association Committee Officers

Officers are key to ensuring the group is effective and that the day-to-day running of the association is well managed. There are four committee officer positions:

1. Chairperson
2. Vice chairperson
3. Secretary
4. Treasurer

1. Chairperson

A common misunderstanding of the role of a chairperson is that this officer does everything, however they do not. They instead ensure that everything gets done.

The Chair is the 'face and voice of the TRA' that ensures that the resources and skills of all committee members are utilised to the full. This will help in creating an effective TRA.

The main responsibilities for the Chairperson are:

- a) setting agendas in partnership with the Secretary.
- b) ensuring that the meeting gets through all its business in the allocated time available.
- c) keeping the meeting in order and ensuring that everyone has an opportunity to be heard and to stop inappropriate interruptions and irrelevancies.
- d) making sure everyone is clear about what decisions have been taken.
- e) ensuring that everyone knows who is going to do what tasks.
- f) Keeping a meeting in order

Hot Tips for chairing meetings:

- a) ensure the meeting keeps moving and does not run on too much on any one subject. If it looks like doing so, check with everyone that they are happy with this and advise that it will mean that the meeting will go on longer than planned if they want to keep discussing the subject.
- b) if it looks likely that the meeting will overrun suggest that some items are postponed until the next meeting.
- c) be clear and concise. Vague suggestions and proposals may result in vague discussion.

- d) draw the item to a close by summarising the main points, what has been decided, and who is going to carry it out.
- e) ensure the secretary has time to record the decisions and who is going to carry them out. It can be difficult at times to keep meetings in order therefore it is important for all members to be advised of the Code of Conduct prior to the meeting starting so that they are aware of the rules and parameters.
- f) Depending on the size of your committee it may be useful for members to “speak through the Chairperson” when they have something to say and the Chairperson controls who is able to speak.
- g) It is very important that everyone is given an opportunity to speak and those who may frequently interrupt are monitored. Be aware that some people find it difficult to talk at meetings and you should look to make sure they are included and make it as easy as possible for them. However, the Chairperson also needs to be aware that some people have a lot to say and may need firmer control to allow time for others.
- h) Briefly check everyone is happy with their opportunity to speak and that the meeting is ready to decide. Then make sure the meeting makes a formal decision (even if it is to defer until further information is obtained) and that this is recorded.
- i) Consider having “Chairs Action” when needed whereby certain decisions outside of the committee meeting are made by the Chairperson. This may be required to give the Chairperson the necessary power to act on behalf of the association in the areas delegated. For example, attend a council meeting representing the TRA. All action taken by the Chairperson must then be formally reported at the next meeting.

2. Secretary

The role of Secretary is not as defined as that of Chairperson and will vary from one committee to another.

Some basic tasks that can be carried out by the Secretary includes:

- a. Notifying members of TRA meetings and events by means of various communication tools.
- b. take the minutes in meetings.
- c. keep the records of past minutes and meetings.
- d. set the agenda in partnership with the Chairperson.
- e. let the committee/members know when and where the next meeting will be held.
- f. keep the membership records.
- g. keep a log of all correspondence in and out.
- h. send and receive letters on behalf of the association.

- i. liaise with the council regarding day-to-day matters.

Hot Tips for the Secretary:

- a. It is common to promote meetings and events through printed communication. However, this at times can be expensive and can make an impact on the TRA budget, depending on the size of the TRA. If possible aim to utilise all form of communication tools that would enable your members to participate and is their preference to be informed. Such as social media platforms, for example a Whatsapp Group, Twitter and Instagram, Facebook etc
- b. Taking the minutes are not meant to be a verbatim record of what was said at a meeting. Only the main points of the discussion, and who is to carry out any agreed action, need to be recorded.
- c. Aim to know everyone at the meeting and where they are from (send an attendance register around and ask everyone to write their name and address);
- d. Sit where you can see who is speaking.
- e. Take rough notes in the meeting - they can be written up in full later. If it is not clear what is being said or agreed ask for clarification (perhaps speak to the person presenting the item before the meeting for a better understanding of what is being discussed);
- f. Do not try to record everything but make sure there is a note of what has been proposed, who will carry it out and the completion date or deadline;
- g. Record the names of those who propose and second motions.
- h. After the meeting ensure that members get the minutes in good time (this should be within two weeks of the meeting) and that copies are kept of all past minutes.
- i. In advance of a meeting, circulate the minutes and action points from the previous meeting along with the agenda.
- j. It is important that the business of the association is properly organised and records are easily found. So have a have a simple filing system for records such as minutes.
- k. Get a book to record correspondence received and when they were answered.
- l. Get a diary to record future meeting dates.
- m. Make a "to do" list.
- n. Share information as the Secretary often receives paperwork on behalf of the TRA.
- o. Make sure that any information received is forwarded to the relevant officer on the committee.
- p. Ensure that the other committee members work closely with the Secretary as this position is the 'backbone' and make sure that the workload is shared amongst other members. If there is too much to do, raise it with the committee and ask if other members can assist.

This helps to maintain a reasonable workload and gets others more involved.

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3. Treasurer

The Treasurer is the person who has day-to-day responsibility for the association's money and for keeping accurate financial records. However, it is the committee who has the overall responsibility for ensuring that the finances are managed properly and deciding how the money is used.

Hot Tips for the Treasurer:

- a. be methodical and keep clear records of money received or paid out.
- b. ensure your paperwork is accurate; record everything in and out - do not offset one against the other when entering in the accounts.
- c. keep the association's money separate from your own.
- d. do not keep large amounts of cash - put it in the bank.
- e. for petty cash, ensure that the amount held equals the figure in the cash book.
- f. ensure that the bank account requires two signatures for cheques or withdrawal forms.
- g. check the bank statements carefully and regularly. Filing systems should have four files:
 - ❖ **Invoices (waiting to be paid and which have been paid)** - these should be kept in date order as they arrive. Invoices (which have been paid) - these should be filed in date order as they are paid, and numbered so that you can easily trace them. Use file dividers and have a section for each month, so you can quickly find them later.
 - ❖ **Petty cash slips and receipts** – keep these in date order, with monthly dividers. The petty cash slips should be numbered.
 - ❖ **Bank statements** - filed in date order.
 - ❖ **Receiving money** - ensure that there is an issue of a receipt for any money received.
- h. Paying by cheque gives a clear record of who has been paid, how much they were paid, and this can be verified by bank statements.
- i. Ensure you get an invoice or receipt whether you pay by cash or cheque.
- j. Fill out a Petty Cash voucher and ask the person receiving the money to sign for it.
- k. Staple any receipts to the voucher, number it and keep them in order.

- l. Write the date and number of the cheque on the bill/invoice, if you have requested the bank or building society to raise a cheque from the account.
- m. Keep separate books for your Petty Cash and your Bank/Building Society account.
- n. Routinely conduct bank reconciliation by checking the entries in your cash book against your bank statements.
- o. Written or verbal reports to the committee is important giving a summary of the current financial position of the association taken from the bank account and cash book. This should be presented at general meetings, Annual General Meetings and to the committee require to meeting. This will enable the treasurer to state how much money the association has available and its expenditure quarter.
- p. The TRA account/s will require auditing by a professional auditor who is independent from your association. Aim to have accounts accounted at least twice per year. This is good practice as helps and reassures the treasurer, particularly if the officer is new to the role, identifies and deals with any problems with the accounts.
- q. Demonstrates to your members that the TRA's finances are in order.
- r. A treasurer's report to the AGM must be a written report and available to all members of the association.
- s. If the treasurer requires further assistance to present the accounts at the AGM, invite the auditor to the AGM to address any issues. This builds the confidence of the treasurer and demonstrates the professionalism and integrity of the TRA committee.