

National Association of Federal Retirees

Volunteer Role Description

Approved - BOD Meeting September 25, 2018

Title: Branch Services Coordinator (BSC)

Role:

Working as an integral member of a volunteer/staff team led by the Manager of Human Resources and Volunteers, the BSC helps to organize training activities and supports Directors in providing logistical and administrative support for regional and/or district meetings. He or she coordinates communication and feedback between branches, Directors and the National Office, and may visit branches to convey information or provide support as directed by the Director(s).

Selection Process:

When a vacancy occurs for a Branch Services Coordinator position, a call for applicants from the District will be issued by the Manager of HR and Volunteers, and the BSC will be selected based on competencies and suitability.

Appointment Process:

Appointment of Branch Services Coordinators will be made by Directors, by general consensus, following consultation with all relevant Branch Presidents and the Manager of Human Resources and Volunteers. Subsequent to appointment, BSCs will work closely with both the Manager of Human Resources and Volunteers and the Directors to coordinate Regional and District activities and provide support to branches.

Term:

The Branch Services Coordinator will normally be assigned for a three-year term, which may be extended for additional terms of one, two or three years.

Financial Management and Contracting:

Funding for BSC activities is included in the District budget managed by the Director(s). BSCs may incur expenses on sanctioned activities to the level approved by their Director(s).

Costs related to BSC attendance at Annual Meetings of Members (AMM) and associated BSC meetings at AMM are borne by the National budget.

BSCs invited by a branch to attend a branch function or travel on behalf of a branch that is not otherwise covered by the District budget, are free to participate, as long as the branch agrees to cover their expenses, consistent with the National Travel Policy.

Claims may be submitted directly to the National Office for processing, unless otherwise directed by Director(s). To ensure efficient processing, claims should be submitted within 30 days of the activity, and the activity should be described in detail on the claim form. All expenses will be assigned to the

appropriate District budget unless documentation authorizing assignment to another budget is included with the claim.

To ensure contracting and payment limitations are respected and events are commodity tax compliant, the National Office will review and sign-off on **all contracts** (for facilities, hotel meeting space, rooms, meals, etc.) and make payments, including deposits, directly to the facility.

Activities:

Annually, in preparation for establishing District budgets, BSCs will work with the Directors and the National Office staff to plan meetings, training and branch support activities for the year and determine associated costs. The following are core BSC activities, allowing for variations across Districts with respect to the location and frequency of meetings and the management of branch visits.

Training and Development for Assigned Branches

- Works with Training and Development Officer (TDO) at National Office to conduct training needs analysis for branches
- Provides input and feedback on training developed by the staff, and coordinates Branch input on training content
- Provides logistical support to Annual Training Conferences or other training events within their districts, normally scheduled in conjunction with Branch Regional or District meetings. This includes arranging meeting space, reference material and equipment, meals and refreshments. Liaises with the National Office regarding contracts and payments, as appropriate.
- Assists the TDO in identifying and engaging appropriate trainers, presenters and facilitators (staff, volunteers or outside subject matter experts) for training activities.
- Conducts post training evaluations with participants
- Assists branches in developing and budgeting for in-house branch volunteer training programs to supplement annual training conferences and support individual volunteer skills gaps
- Facilitates on-line training sessions for branches or for groups of branches using teleconferencing and web-based technologies.

Branch, Regional and District Events Planning and Support

- Plans and supports Regional and/or District meetings, in accordance with the annual District plan and budget. This includes arranging hotel rooms, meeting space, reference material and equipment, meals and refreshments, and travel coordination.
- Ensures contracts and invoices (including down payments) for facilities, meals, etc. are forwarded to the National Office for sign-off and payment.
- At least one month prior to the meeting, develops the meeting agenda, in consultation with the Director(s) and branches
- In consultation with the Directors, National Office and branches, procures speakers and facilitators
- Ensures minutes/records of proceedings are produced and distributed
- Ensures expenditures are in accordance with the Association's Budget Directives and Travel Regulations, and the District budget. Submits invoices and receipts to the National Office in a timely manner. Tracks and reports on expenditures.

Branch Liaison

- Attends all District and/or Regional meetings held within their jurisdiction

- As directed by the Director(s), may visit branches within their region to convey information, provide support or determine training and administrative support needs.
- Ensures Directors and the National Office are aware of significant branch activities or issues.
- Facilitates branch requests for support or information from the National Office
- Monitors the health of branches within his/her territory, reports concerns regarding branch viability to the Directors and National Office and works with all parties to develop and implement intervention plans.

Facilitates Branch input to the Directors Board and the National Office

- Working in cooperation with staff, provides support to the Directors within their jurisdiction, as follows:
 - Facilitates teleconferences and web conferences for Directors to communicate with Branches in their Districts
 - Provides input on activities and Branch issues of interest to the Directors and National Office
- Solicits and assists Branches in submitting nominations for Volunteer Recognition Awards
- Assists Branches in ensuring and maintaining accurate volunteer records in the Client Relationship Management System

General:

- Prepares and submits bi-annual activity reports to the National Office for subsequent distribution to the Directors.
- Participates in the BSC annual meeting with National Office staff scheduled in conjunction with the AMM
- Attends the Annual Members Meeting as authorized
- Participates in quarterly teleconferences coordinated by the National Office to share information, concerns, ideas, and best practices

Other Activities:

On rare occasions, BSCs may be authorized by Directors or the National Office to participate in activities not typical part of the BSC mandate, such as membership recruiting or advocacy related activities. If such spending is contemplated, written approval must be provided, and the appropriate funding authority determined in advance.