

Much like the national board, branches have volunteer boards with overall responsibility for running the branch and supporting volunteers who work on behalf of the branch. Branch boards are therefore responsible for ensuring that provisions are in place to support and manage volunteers and mitigate risks associated with volunteer activities.

Branch boards may also create committees with specific ongoing or project-based responsibilities related to volunteers or specific groups of volunteers. They may also employ individual volunteers on an episodic or project basis. Officers (President, Vice President, Treasurer, Secretary, etc. as defined in a branch's by-laws) are elected as directors by the membership at a branch Annual General Meetings or may be appointed.

The branch may elect members to the executive to carry out additional key functions. Alternatively, the branch executive may choose to appoint volunteers to cover specific responsibilities, as necessary.

Branch President

As the head of the Branch board, the President provides leadership to the board, ensuring effective branch management through governance, financial planning and management, delivery of member support, local advocacy activities and being informed on organizational matters. As well, the president represents the branch at the national AMM.

The Association's by-laws state that the Branch President shall chair branch meetings and provide leadership to the branch. In addition to representing the interests of the members of the branch, the Branch President bears primary responsibility for ensuring that the branch is compliant with the national by-laws and Association policies, including the following:

- ensuring branch by-laws and any subsequent amendments are submitted for review by national office and approval by the National Board;
- sending to the Chief Executive Officer, no later than May 15 of each year;
- a copy of the minutes of the branch annual meeting, signed by the president and another elected director;
- a copy of the audited branch financial statements for the year as reported at the branch annual meeting;
- a statement identifying the branch financial accounts and the institutions where they are held.

Other responsibilities of a Branch President include the following:

- signing contracts on behalf of the branch;
- delegating responsibilities appropriately among members of the executive and appointed volunteers;

- coordinating the activities of the executive and volunteers;
- keeping branch directors informed about national, provincial and local Association activities;
- representing the branch and Association at inter-branch meetings, in meetings with local media and in community activities;
- maintaining effective contact with the members, district directors, their designated support volunteers, other branches, and National Office.

Branch Vice-President

The Vice President of the Branch board assumes the duties of the President in the event of the President's absence. The Vice President's role is defined by the branch by-laws and duties are carried out as assigned.

The template for branch by-laws states: The vice-president shall assume the duties of president in the event of the president's absence, disability, or refusal to act. The vice-president shall have such other duties and powers as the branch board or executive may specify.

Many branches assign the vice-president with responsibility for ensuring the Branch by-laws and Standing Motions are relevant and up-to-date annually. Branches may have more than one vice-president if they choose, but should designate first vice-president and second vice-president, etc. if they do.

The Vice-President is elected by the membership at a Branch Annual Meeting.

Branch Treasurer

The Treasurer provides effective governance, focusing on financial planning and management.

Working as an integral member of the branch board and accountable to the Branch President, the Treasurer shall keep the financial accounts of the branch and shall exercise primary signing authority for expenditures. The Treasurer is involved in preparing annual branch budgets.

Treasurers are elected (or may be appointed) by the membership at the branch Annual General Meeting.

The template for branch by-laws sets out the requirements for appointing a treasurer. However, a branch may opt to elect officer positions such as treasurer rather than appoint them.

The by-laws state the following regarding appointing a treasurer:

- The branch board or executive shall appoint a director to serve as treasurer. The treasurer shall keep the financial accounts of the branch and shall exercise primary signing authority for expenditures.

The treasurer has two responsibilities at each branch annual meeting:

- Report on branch finances for the previous fiscal year;
- Provide a budget forecast for the next fiscal year.

As well, the treasurer, who is accountable to the Branch President, is responsible for the following:

- depositing funds in the branch's accounts in the designated financial institution;
- paying all approved expenses or disbursements incurred by the branch and ensuring cheques are co-signed in accordance with national policy;
- Preparing budget and financial reports for approval at the branch executive and presentation to general membership meetings;
- having custody of branch funds and maintaining accurate financial records;
- coordinating the preparation of annual financial reports, including statements, annual review form, and other appropriate documents for submission to the branch annual meeting and to the National Office;
- providing quarterly reports to the branch executive with copies of receipt and disbursement and the audited or reviewed financial statements each year.

Branch Secretary

Secretaries are elected (or may be appointed) by the Membership at the Branch Annual General Meeting.

The Secretary provides effective governance, focusing on administrative functions.

Working as an integral member of the Branch Board and accountable to the Branch President, the Secretary is responsible for all administrative needs of the Branch.

The usual responsibilities of a person serving in that function are two-fold:

- preparing, recording, and maintaining the minutes of branch meetings and meetings of the executive;
- preparing the branch annual meeting report to be sent to the National Office (with copies to the district directors).

The secretary may also coordinate branch office functions such as the following:

- controlling branch office activities, including staffing of volunteer members as required;
- ordering branch stationery and supplies;
- maintaining an updated policy binder;
- recording and handling incoming and outgoing branch correspondence;
- making copies of correspondence for mailing or distribution at meetings.

Other branch volunteers positions

Director, Membership Growth

Director of Membership Growth supports branch membership growth through the implementation of effective recruitment and retention strategies.

Working as an integral member of the branch board and accountable to the Branch President, and with the resources and support of the National Office Membership staff, the Director of Membership Growth is responsible for ensuring the best of use branch resources to maintain effective recruitment and engagement activities.

This position is appointed by the Branch Executive.

Branch Advocacy Liaison (BAL)

The Branch Advocacy Liaison role is an integral element of the Association's advocacy network. As the Branch's designated contact and coordinator for Branch advocacy activities, the BAL works closely with the Advocacy Program Officer in support of the Association's advocacy strategy.

The BAL role is assigned by the Branch President to a volunteer who has indicated the interest and the capacity to help support the Association's national advocacy strategy at branch level. Duties which might include:

- coordinating the branch's contribution to national advocacy initiatives;
- establishing and maintaining contact with the offices of Members of Parliament/Legislature whose constituencies fall within branch boundaries, and similarly developing relationships with the constituency associations of other parties;
- liaising with other advocacy volunteers within the district (volunteers appointed by the district directors or by other branches) to promote a coordinated approach to networking with seniors' organizations and other groups with interests allied with those of the Association;
- regularly updating the executive and branch members on advocacy initiatives.

Director Volunteer Recruitment and Engagement

The Director Volunteer Recruitment and Engagement provides recruitment and engagement expertise when recruiting potential volunteers. This Director may be appointed by the branch board.

Working as an integral member of the Branch Board and accountable to the Branch President, and with the resources and support of the National Office Volunteer Engagement staff, the Director Volunteer Engagement and Recruitment is responsible for ensuring that the Branch has appropriate volunteer resources to maintain effective operations.

Branch Membership/Registrar

Although most branches have transferred responsibility for membership administration to the National Office, every branch should designate a director or volunteer to support the following membership related activities:

- develop proficiency in using the Association's Client Relationship Management (CRM) system to conduct research and produce reports;
- do phone follow-ups for members who don't renew;
- serve as liaison with the National Office on membership issues;
- manage local member recruiting activities (this may be segregated from the membership administration role and performed by another volunteer or committee).

If the branch has retained membership administration responsibilities, the Branch membership/registrar volunteer would normally perform the following additional activities: maintaining accurate membership records using CRM.

- providing the branch executive and the district directors with membership reports, noting increases or decreases in membership, delinquencies, etc. and suggesting possible corrective action;
- requesting annual renewal payment of dues from non-DDS members and issuing membership cards on receipt;
- following up with delinquent non-DDS dues-paying members to ensure that their annual dues are paid.

Communications, which might include:

- editing the branch newsletter and branch events content in Sage;
- managing the branch website and links with regional or the national website;

- managing branch social media;
- creating and transmitting bulk e-mail communications to members using “Click Dimensions”.

Social, which might include:

- leading a team of volunteers to organize and manage the logistics of branch social functions;
- researching venues and negotiating terms with hospitality service providers, for recommendation to the branch executive;
- ensuring appropriate event insurance is in place to protect the branch against liability;
- canvassing members for ideas on future events and seeking feedback on recent events.

Phone Committee

Many smaller branches can maintain a personal touch with their members by having volunteers reach out in concrete ways:

- operating “phone committees” that call or email members to remind them of upcoming meetings or events;
- sending cards and expressions of sympathy to members who are ill or bereaved or to the families of members who have died.