

President

Every local institute must elect a president at its Annual General Meeting to hold office for the ensuing twelve months. In effect, the president is a representative of the CII in that institute's local area.

The president is ultimately responsible for all the activities, educational, social and charitable and is the head of the team of elected local institute officers and council members.

The president will fulfil both an ambassadorial and representative role, with the key focus to:

- Represent the local institute at local, regional and national events
- Maintain the profile of the local institute locally, regionally and nationally
- Develop and expand the services of the local institute for the benefit of all members
- Liaise with other appropriate professional bodies in the area
- In conjunction with the treasurer ensure the local institute is run on a financially sound basis.

Remember, the role of the local institute is primarily to adopt the objectives of the CII, as defined in its Charter and Bye-laws, for the benefit of your local members, prospective members, students and the local insurance and financial services community.

Consequently, the president should develop a close working relationship with the CII for the region.

Main responsibilities

- To act as an ambassador for the local institute at all local, regional and national functions.

- To follow CII National Policy/Guidelines for implementation at local level.
- To take forward ideas/topics from the local institute direct to the CII, via the regional representative or through the regional council.
- To chair the local institute council meetings, and to oversee and direct council.
- With the Institute Secretariat, to create an annual development plan in conjunction with the Regional Membership Manager.
- To complete the annual local institute assessment in conjunction with the Regional Membership Manager.
- In conjunction with the secretary, to ensure the local institute acts at all times within its constitution.
- To encourage recruitment of new members.
- To encourage existing members' involvement in local institute activities.
- To develop/maintain a succession plan for the core local institute council roles.
- To promote the objectives of the CII whenever possible.
- To develop and maintain a working relationship with staff at the CII and with the CII's Regional Membership team.
- To promote Continuing Professional Development (CPD).
- To work with council and (sub-) committees to ensure CPD programmes reflect relevant and current issues.
- To liaise with other professional and academic bodies to further educational and social development of the local membership.
- To promote healthy, on-going dialogue between the local institute, regional council and the CII.
- To attend relevant dinner functions in his/her official capacity.
- To ensure the local institute is represented at the CII Network Conference.

As Ambassador

The president is the institute's principal representative. At functions such as fellow local institute dinners the president is 'on duty' and should use the occasion to represent the views of the institute both formally and informally.

As Regional Representative

The president must always act in a professional manner. If asked to deliver a speech, the president should ensure that it is properly prepared and delivered.

Often the president is a local members' representative on committees (including CII committees) and/or working parties. It is essential that, to undertake the representation role properly, all papers are read in advance of the meeting and, where it is appropriate to do so; the views of the membership or of the local council are obtained and put forward at the meeting.

The president should ensure that decisions taken in respect of any matters raised on behalf of the local institute are fed back to those who raised the matter.

Constitutional Responsibilities

Every institute has a written constitution based on a model constitution. All presidents should familiarise themselves with their own institute's constitution. It is important that local institute affairs are conducted in accordance with the constitution. That is essential to the effective running of the institute and avoids potential difficulties.

Knowledge of the constitution, and of the latest version of CII's Charter and Bye-laws, can also be a great help in conducting meetings.

Presidents should also be familiar with the standard reference material issued by CII, copies of which can be obtained from the local institute treasurer, secretary, education secretary, careers officer or public relations officer depending upon the subject being addressed.

Presidents should also ensure that (if they are not the elected person) they are fully briefed by their regionally elected CII Forum Officer. If additional information is required, then contact should be made with the relevant department at the CII, via your Regional Membership Manager.

Financial Management

All institutes have a treasurer who is, together with the president, responsible for the financial management of the local institute. (Separate guidelines have been prepared for local institute treasurers). Most treasurers are diligent and experienced but the president, as the Senior Officer during the institute year, should ensure that:

1. auditors (professional or otherwise drawn from the membership) have been appointed in accordance with the local institute's constitution
2. the institute's 'books' have been properly scrutinised and are available for random audit during the year
3. a budget has been prepared and that ongoing checks are carried out so that any major variances are identified and remedial action (if necessary) is taken at the earliest possible opportunity.
4. regular financial reports are submitted to the local council. Should any financial difficulties be identified (especially if these might lead to an application for a Special Grant) then contact should be made with the CII (via the Finance Department) immediately
5. regular financial reports are submitted by the chair and/or treasurer of any local committee formed by the local institute.

As a voice for your local institute

From time to time the CII seeks the views of local institutes on various issues. These cover a wide range of subjects and can include constitutional issues, requests for statistical information, views on examination provision, CPD speakers, tuition matters etc.

The local president has a duty to ensure that their institute does respond to requests of this kind so that the CII can develop plans and make decisions on the basis of the views and information submitted by local institutes. A lack of response means that the views of the local membership will not be taken into account when strategic and other decisions are made.

Meetings at the CII

The governance of the Institute is by the Council and its special Committees. Each year members are invited to put forward their names for service on specialist committees. Some committees also have specialists on them and there are usually more offers of service than vacancies, and thus not all offers can be accepted. However, offers to serve on committees are always welcome. Details will be communicated to local institutes as and when opportunities arise.

Programme

Most local institutes have an established pattern of meetings which should be reviewed on a regular basis. Some presidents also find it useful to choose a theme for the year which can be helpful in planning a cohesive year's work. More advice and guidance on your programme can be found in the CPD focused bulletin of the Deputy President Hub.

Contact from the CII

As president, you will be the point of contact for various central CII communications, but be aware the CII's Secretariat Department will write direct to the local institute officers rather than the president, for certain specific items as follows:

- insurance arrangements - treasurer
- annual dinner (e.g. re speaker) - dinner secretary
- special grants - treasurer
- membership matters - secretary