

The First 100 Days of being a new Chairman

...A checklist of basics to review and change/implement as required

Congratulations! You have been elected as the Chairman of an Association/Federation (known as an 'accounting unit' of the Conservative Party. What now?

The lists provided here are prompts for tasks which may need to be reviewed/undertaken now you are the Chairman and lead Officer. Not all will be applicable for everyone, but by considering each item we hope to help you make sure nothing important is overlooked.

For guidance on longer term strategy for your organisation, please use Campaign Toolkit where you can find guides to assist on:

- Membership Recruitment & retention.
- Fundraising & budgeting.
- Campaigning to win elections.

Or speak to one of the Voluntary Party Managers.



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FINANCE

- Review the Association finances and compare against your annual Budget. Is action required to generate income/cut costs?
- If your turnover will be over £250,000 for a whole year, have qualified auditors been appointed?
- Confirm your membership payments are being received into the correct bank account.
- Complete any required bank mandate changes to ensure signatories reflect the current officers. Close redundant bank accounts & transfer any remaining funds.
- Ensure online banking is available.
- Review your Trustees and all paperwork relating to property and leases. Is all in good order, current and correctly filed?
- Review the Association budget. Ensure costs of Bluetree website have been included and the payment details are correct.

ORGANISATIONAL

- Write to all members and introduce yourself and the new officer team. Set out the priorities of your term of office and how members can help to achieve your objectives.
- Obtain office keys if applicable, and update the provider of your alarm system with contact details in case of activation.
- Re-read the Party Constitution and your local Rules (Schedule 7 or 7A). Ensure you are familiar with the contents and have a printed copy to take with you to all meetings, for reference.
- Check the composition of the governing body (Executive Council). Does it meet the criteria set out in the Constitution?
- Set AGM date for the following year. Ensure the AGM is held before 30th June.
- Review digital and paper documents held by the Association, especially



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the minutes of Management and Executive Council meetings and Strategy Plan. Familiarise yourself with key decisions made. Mark up documents with accurate archive dates. Financial records need to be kept for 8 years, employee records for 6.

- Confirm the status of all branches and clubs. Are they active? Where do additional branches need to be formed?
- Send name, address, telephone and email address of each officer, along with details of your representatives to the Area Council, to **Bluebook@conservatives.com** to ensure Party communications are received by the correct office holder.
- Review who has access to your VoteSource data. Ensure that the access is appropriate.
- Ensure the Executive sets/has agreed emergency selection rules for local government selections.
- Review the progress of local government candidate selection,

as appropriate, to ensure a list of Approved Candidates is always maintained.

- Confirm memberships of specialist groups, patrons club, business clubs – make them aware of the change of Chairman (and any other officer changes).
- Meet with key stakeholders and elected representatives. The establishment of good working relationships underpins the success of your Association.
- As line manager for any locally employed staff, review employment contracts and job descriptions, meet and agree KPIs for the following month.
- Diarise local events, meetings and activities you are going to attend, to show accessibility and leadership.
- Ensure the Association is registered as a Data Controller & a Data Processor with the ICO.
- Review any equipment leases.

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CAMPAIGNING

- Review your Association website. Work to update and ensure it is kept current and interesting.
- Review and update walk routes. Identify gaps and work to complete.
- Update the elections office at the council with who to contact for which areas.
- Marked register – has the entry for your previous election been started? Make sure the copies have been purchased and shared amongst trusted volunteers so entry can continue.
- Review who is approved to run paid Facebook adverts. Review who is authorised to sign off on posts.
- Review online presence over all platforms being used. Amend names and content as needed to reflect Officer changes.

- Review Connect calling scripts. Amend names and content as needed.
- Review active surveys. Amend content, imprints and branding as needed.

MEMBERSHIP

- Review lapsed members. Contact to inform of officer changes & encourage to rejoin.
- Review members in their grace period. Contact to encourage to pay their subscription before their voting rights expire.
- Review how members pay. Contact members with a local standing order to switch to direct debit payment.



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WHEN YOU NEED HELP, PLEASE CONTACT:

Voluntary Party Manager Team	voluntaryparty@conservatives.com
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OTHER HELPFUL CONTACTS:

Membership	Membership@conservatives.com
Financial Compliance	Financialcompliance@conservatives.com
Data Protection	Dataprotection@conservatives.com
VoteSource	Helpdesk@conservatives.com
Campaign Toolkit	Toolkit@conservatives.com
Digital Campaigning	Digitalcampaigns@conservatives.com

