

## GT4.1 CifA Group budget guidelines

### Committee business and travel

The central CifA budget will allocate funds to each individual group to a maximum of £800 to cover the running of the Group committee business. These funds can be used to cover items such as room hire, travel expenses and childcare/dependent care associated with holding Group committee meetings, attendance at the Groups Forum and your Group AGM.

Each group should complete the annual group budget request form (GT5.2) by the end of January each year. Budgets will be confirmed by the beginning of the financial year (1 April).

Please include as many details as possible to help the CifA staff to agree an appropriate amount up to £800. This includes how many meetings are held each year, how many committee members you have and a rough indication of potential travel and care costs per meeting. For example, this could be train journeys or petrol, childcare/dependent care.

There is also a section on the form which relates to group income. For the annual budget, this should incorporate your groups anticipated income from non-members. It does not need to estimate income from group activities/events as these are separate from the running of Group committee business.

Group Treasurers will be asked to approve all expenses claims from committee members in line with a agreed budget before they are submitted to the CifA office. Treasurers should ensure that their committee members are aware of the conditions for claiming expenses in the claim form, particularly the need for receipts to be submitted with a claim (GT4.3).

### Group events and activities

Each Group can obtain separate funding from CifA to carry out events such as conference sessions, day schools, and CPD training workshops. Requests for funding are made on a case-by-case basis. A budget request form should be completed (GT5.1 and 5.2) and sent to the Membership Engagement Coordinator.

This outline provides details of the event including what it will cover, how it will benefit CifA and group members and any possible publications or articles that will result from it.

Applications should be submitted **at least 8 weeks** in advance of the event and can be submitted at any time. It should be noted that applications will be considered on a first-come-first-served basis, assessed on their relevance to CifA's Strategic plan and subject to the availability of funds.

Once the budget is agreed, the information is passed to the Events Manager who will support you through your event.

### Group promotion

The promotion of the group is a key part of recruiting and retaining group members, and letting people know what the group does. Currently non-CifA members can join groups for an annual fee of £10. As part of your annual budget request (GT4.2), we ask you to provide an anticipated income from non-member fees.

To help promote group activities, CifA will fund and produce information leaflets, a banner or postcard or similar. These will be produced in conjunction with the group committee, but the costs

will come directly from the CifA promotions budget, rather than the committee meeting budget. The CifA office can also provide CPD certificates and other CifA promotional material on request, including sending group or post-event surveys.