About the CQI

The Chartered Quality Institute exists to make society better by supporting excellence in, and the widespread adoption of, quality management. We are the only professional body dedicated to governance, assurance and improvement – helping quality professionals protect the reputation of organisations around the world.

While CQI members deliver excellence in business, IRCA members are recognised as the gold standard in management systems auditing. We are the largest management system auditor certification body in the world – providing organisations with essential assurance that their systems are working effectively and showcasing our members as key contributors for business improvement.

Our Competency Framework sets out how individuals can add value to business and to society. Together, the CQI and IRCA form one organisation, the CQI. By operating as one organisation, we can combine operational and strategic functions to offer improved services and products to our members and stakeholders.

Branches

The CQI has a network of local branches throughout the UK and abroad. CQI branches exist to support the professional development of CQI members and IRCA Certified Auditors through:

- Enabling the participation of the membership in open and informed discussions on areas of quality including governance, assurance, improvement, leadership and context
- Inspiring and supporting the continuing professional development of CQI members through a programme of quality-related events and activities
- Supporting and promoting the strategic objectives of the CQI
- Promoting membership of the CQI
- Engaging with interested parties, including professional bodies and local industry

Branch membership:

Membership of a branch consists of all CQI members living or working in the branch catchment area. Members are assigned membership of branches based on their home or business address, as supplied to us when they join. Should a member inform the CQI of a new home or business address, they will be reassigned to the relevant branch. Members can also select their branch via their members profile.

Employees of CQI Corporate Partners and Approved Training Providers resident or working in the branch catchment area may also attend branch meetings. Only CQI and IRCA members have voting rights.

Information about branch members:

Each month, branch committee members receive a report about membership in their branch catchment area. The data is anonymous and contains no personal data. The report contains a summary of the following demographics of the branch:

- Age band
- Gender
- Grade
- Start year
- Postcode
- Industry sector
- Area of interest as expressed on members' profiles

To ensure that membership databases are kept up-to-date and the wishes of members to be contacted, or not, are respected, the CQI holds branch members details centrally.

It is the policy of the CQI that the Professional Networks (PNET) team send out any communications to branch members on behalf of branches and regions. If branches require anything to go out to their members, they should get in touch with the PNET team.

This helps to ensure that:

- details for members joining and leaving are up-to-date
- contact details are secure
- members do not receive branch communications if they have opted out of doing so

- there is continuity in style and format
- we are compliant with current data protection laws including GDPR

All volunteers must adhere to the guidelines on data protection and confidentiality, and have read, understood and signed the Volunteer Confidentiality Agreement.

Branch operation and administration

Branch committees:

Our branches are led by committees of dedicated volunteers who aim to organise at least 4 events a year. These volunteers play a vital role in the operation and administration of branches by providing interesting and engaging talks, seminars, events and the opportunity to network with other quality professionals, and those from other organisations, industries and disciplines.

Branch committees report to the Regional Steering Committee (RSC) at which they are represented. There is a representative from each region who sits on the Membership Council (MC). The Membership Council are responsible for the overall governance of the branch network ensuring that all aspects are running smoothly and in line with the CQI's strategy.

Branch volunteers welcome guests as they arrive at events and give out information about the branch, the CQI and explain the benefits of being a member to non-member guests.

There are support documents available to induct volunteers into their roles, as well as support from the PNET team.

Branch committees must include:

1. **Chair** - responsible for leading the branch committee, ensuring the smooth running of the branch, and for ensuring the branch's compliance with CQI requirements

2. **Vice Chair** - provides support to the Chair in their role and can deputise for the Chair in their absence

3. **Secretary** - responsible for the effective operation and administration of the branch including communication within the committee, and between the branch committee, Regional Steering Committee, and CQI PNET team

Branch committee roles can also include:

4. **Events Coordinator** - responsible for the effective planning, promotion, delivery and administration of events (other committee members are expected to provide support as required)

5. **Social Media Coordinator** - promotes branch activities through social media channels as agreed with the CQI and in line with the relevant CQI policies

6. **Committee Member** - everyone in the committee plays a part in the smooth running of a successful branch. Committee Members support other branch officers in their endeavours and may be assigned specific short or longer term responsibilities

Tenure of committee members:

Named branch officers i.e. Chair, Vice Chair and Secretary are elected for a term of three years. No officer can hold the same position for more than two consecutive terms, unless specific approval is secured from the Regional Steering Committee.

Although it is not mandatory, branch officers should try to provide at least two months' notice of their intention to stand-down in order to allow the Committee to plan ahead and find a replacement.

To provide continuity, current and outgoing branch committee members are asked to provide an induction for new committee members. Inductions may include, but are not limited to:

- Key contacts within the branch and region
- Current priorities and future events
- Procedures for organising and reporting events
- Managing finance
- Local contacts (e.g. press, businesses, event venues)
- History of previous events

Branch committee meetings:

Branch committees should hold committee meetings as often as they feel is necessary for the effective operation of the branch. Meetings can be informal but notes and / or summaries of actions shall be recorded and submitted to the Regional Committee as part of the branch annual report.

Branch officers and ordinary committee members should attend meetings in person. Attendance by video conference or conference call is permissible when necessary and with the prior permission of the Branch Chair. Branch officers and committee members who consistently fail to attend branch or committee meetings shall be asked to stand down by the Branch Chair, Membership Council or CQI Professional Networks Manager.

Any problems within a committee can be addressed through the Problem Solving Procedure, which is outlined in the CQI Volunteer Policy.

The cost of meetings should be kept to a minimum and ideally should be held in offices or a public space e.g. pubs or cafes where it is free of charge.

AGM:

Branches must hold an AGM at which members can review the performance of the branch, elect branch officers, and propose events for the coming year. You are encouraged to avoid holding the AGM as a stand-alone event, but instead to combine the AGM with a speaker, workshop or networking event. Minutes shall be taken and submitted to the CQI Regional Steering Committee as part of their annual report. You should also submit a copy to the PNET team.

Annual report:

The PNET team will submit an annual report to each Regional Steering Committee at the end of the year. The annual report will provide a brief summary of branch activity with an emphasis on event feedback, performance against key indicators and targets, and highlighting successes of the branch. Branches can support the PNET team by providing all the required information after each event. The report will include:

- Number and summary of events
- Finances
- Hours donated by volunteers
- Unique visits to the branch
- Number of members and non-members attending branch events

Branch support:

The CQI PNET team is there to support the branch network with the planning, promotion and delivery of events, including:

- Emailing event notifications
- Maintaining branch and region contact details
- Producing marketing materials
- Responding to enquiries about establishing and running a branch

Key contacts list:

Enquiry/Issue	**Department**	**Point of Contact**	**Contact Details**
Branch/SIG events	PNET	PNET Administrator	branches@quality.org
Expenses and invoices	Finance	Accounts Assistant	accounts@quality.org
Quality World and email content	Content	Content Executive	editorial@quality.org
Issues with membership	Membership	Member Journey	membership@quality.org
Potential new members	Membership	New Members	applications@quality.org

Paying branch expenses

Branch expenditure:

As part of operating your branch, we expect you may incur costs such as venue hire, travel expenses, meeting refreshment costs or speaker expenses.

These costs can be paid directly by the CQI (on submission of purchase invoices addressed to The Chartered Quality Institute), or they can be reimbursed to individuals where volunteers have made the original payments themselves. Expenses claim forms are available at: www.quality.org/branch-resources

Spending limits:

Any branch expenses totalling *less than £300* can be claimed without prior agreement from the Professional Networks Manager.

Any branch expenses totalling *more than £300* must be approved by the Professional Networks Manager in writing prior to any commitment being made with vendors. Once approval has been given, the order or service request can be made.

Claiming expenses:

You can submit expense forms electronically by scanning in any receipts and emailing them with the form to branches@quality.org or you can put them in the post, addressing them to the PNET team.

You can type in your name in the signature box or use an electronic signature if you are submitting them via email.

On the expenses form you will need to select a few codes to help us assign the expenses to the right branch and let us know what it is for:

- **Meeting** – select 'Branch expenses'
- **Expense Type** – select the correct description from the drop down e.g. 'travel'
- **Branch** – select your branch from the drop-down menu

Invoices:

If you are asked for a reference number on an invoice please use 'MEMB PNET 29510' as your reference or PO number. Invoices should always be addressed to: Chartered Quality Institute, 10 Furnival Street, EC4A 1AB. If a person needs to be named it should be Caroline Whitson or Michelle Silk.

If an invoice needs to be paid as a matter of urgency, please call us on 020 7245 8564 and this can be arranged.

Volunteer expense policy:

The CQI Volunteer Expenses Policy sets out further details on the CQI's policy on acceptable levels of expenditure and is available to download from here: www.quality.org/branch-resources

The Professional Networks Manager is responsible for all branch / region expenditure and reviews all transactions monthly.

Branch events

Branch events should support the professional development of CQI and IRCA members through advancing their knowledge, skills, or experience of governance, assurance, improvement, leadership, and context.

This can encompass a range of subjects and activities including:

- speakers sharing professional knowledge
- question and answer sessions/debates with subject matter experts
- workshops and practical training sessions
- networking
- local site visits or tours
- mentoring, CV surgeries
- support in preparing applications for CQI membership or regrading to MCQI or FCQI
- workshops to review CPD plans and records

Events can cover subjects which are directly related to quality or those which are complementary and of interest and benefit to members.

Events that are focused on how members work, behave and interact, and how members can effectively communicate, negotiate and influence to achieve positive outcomes are also popular. All events should also include the opportunity to network, and the inclusion of a social event each year is encouraged.

Over the course of a year, branches are expected to hold approximately four events. One of these events should include an Annual General Meeting (AGM) which can be held before or after another planned event.

Event planning:

Branches are encouraged to plan their events with as much notice as possible. Where possible, a programme of the year's events should be prepared annually. Where this is not possible, we recommend a minimum of three months' notice to allow time to prepare and promote the event effectively.

Target audience:

CQI events should be aimed at CQI members, IRCA Certificated Auditors, and employees of CQI Corporate Partners and Approved Training Providers.

Guests:

Attending branch events is a benefit of CQI and IRCA membership therefore they should be aimed at members. However, members are encouraged to bring along colleagues or guests to introduce them to

the CQI, advise them of the benefits of CQI and IRCA membership and encourage them to refer them to the CQI website or the Membership Team for information about membership.

Venue:

Branch committees are encouraged to source low or no-cost venues to host branch meetings. You may wish to approach local employers, educational institutes, Approved Training Providers and CQI Corporate Partners who may be willing to accommodate branch events. Alternatively, branch committees should find a venue which is value for money and accessible.

Timing and location:

Events should be scheduled as appropriate to the needs of members in the area. Typically, events are held in the evening, approximately 19:00 – 21:00. Events may be scheduled at regular intervals (for example, the last Thursday of every third month). You may wish to consider holding at least one event each year at the weekend to accommodate members who are unable to attend evening events. You are advised to make weekend events longer (for example, half a day) and offer a variety of activities; for example, a keynote speaker, followed by a workshop or breakout session, and question and answer session.

Events should be held at a location convenient for members to travel to. If your branch catchment area is particularly large, you may wish to consider hosting events at different locations throughout the year.

Catering:

When organising a branch event, it is normal to include light refreshments such as tea, coffee and biscuits. On occasion branches may hold special events, such as an AGM or annual conference and branches may choose to offer more substantial refreshments for such events (e.g. a light finger buffet). Branches must ensure that spend on catering is good value and appropriate to the size of an event and number of expected attendees. Catering for any event costing more than £300 must first be approved by the PNET team.

Speakers:

Wherever possible the services of speakers should be obtained free of charge with payment being the exception. Where speaker expenses are incurred, they should not exceed £150.

The types of expenses that a branch can cover for a speaker are:

- Standard class public transport
- Mileage at 0.45p per mile
- Overnight stays (if completely necessary)

Speakers should be provided with an outline brief indicating what their presentation should cover and it should be clearly communicated that this is not an opportunity for them to solely promote their services or product.

Each speaker needs to be sent a Speaker Agreement by a member of the branch committee. This should be signed and returned to the PNET team. The agreement gives notice to the speaker about how their data will be stored, displayed publicly and processed. It also includes a Photography & Recording Consent Form.

The agreement can be downloaded from the Volunteer Resources section of the CQI website www.quality.org/branch-resources

Branch committees may offer speakers a small gift of appreciation for their contribution, not exceeding £15.

Please refer to the CQI Volunteer Expenses Policy for further information.

Overall event costs:

The overall cost of the event should not be any more than £500 including venue, catering and speaker's costs.

Venue ~£200

Catering ~£150 (will be dependent on the number of attendees)

Speaker expenses ~£150

If you think your event is going to cost more than £500 please contact the Professional Networks Manager for approval of the additional spend.

Finding event speakers:

If you have a topic that you would like to cover at a branch event but don't have a speaker, please get in touch with the PNET team and they can help you to find a speaker for this subject.

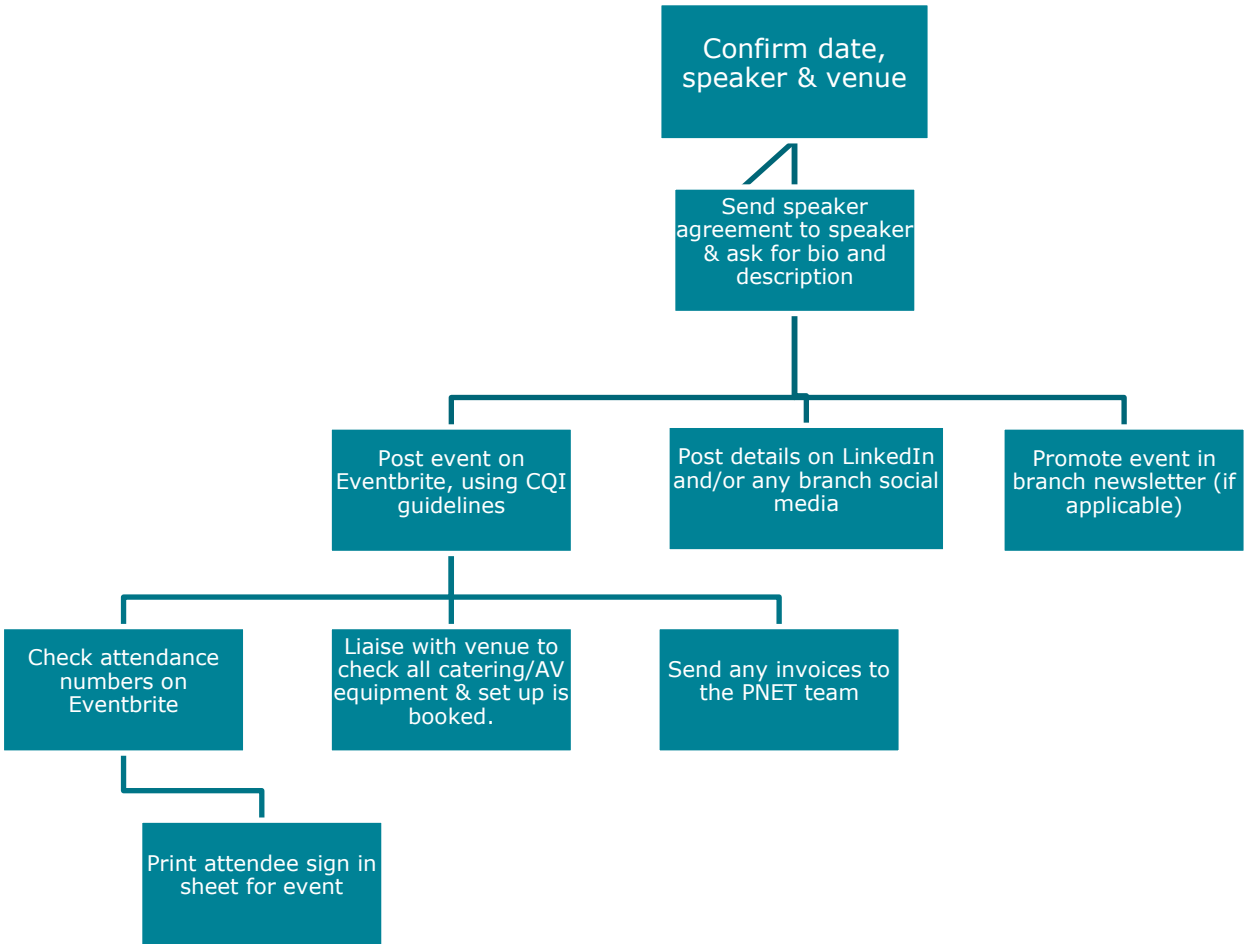
Requests for high-profile speakers, CQI board members or CQI staff to speak or attend branch events can also be made to the PNET team.

Joint events:

Joint events held for example with other Professional Bodies, institutes or companies can be a way of increasing attendance at branch events and introducing new members to the CQI. Funding for these events should be carefully controlled and it is recommended that you formally agree any expenditure before the event to avoid any disputes at a later date.

Health and safety:

A risk assessment should be carried out prior to any site visits or tours. If PPE or special requirements for site access are required, this should be made clear in notification and Eventbrite listings.


Confirm date, speaker & venue
Send speaker agreement to speaker & ask for bio and description
Post event on Eventbrite, using CQI guidelines
Post details on LinkedIn and/or any branch social media
Promote event in branch newsletter (if applicable)
Check attendance numbers on Eventbrite
Liaise with venue to check all catering/AV equipment & set up is booked.
Send any invoices to the PNET team
Print attendee sign in sheet for event

Creating event listings on Eventbrite

Each branch event needs to be listed on Eventbrite to allow information about the event to be easily shared and for both CQI members and non-members to book tickets to attend. The following instructions provide guidance on setting up Eventbrite events.

Event description:

Event title:

Add a short, snappy title. The best titles are attention grabbing or challenging, descriptive and convey a lot in a few short words. Please include the branch name so we can identify your event during the promotion process.

Include:

- Branch name
- Event title (up to 75 characters)

Example:
CQI Birmingham – General Data Protection Regulation (GDPR) Summary

Add a picture:

Make your Eventbrite page look professional with a picture. Add any image from the Eventbrite Stock Images which are listed on the www.quality.org/branch-resources section of the CQI website.

Please Note: We request that you only use the images that are available here as we have permission to use them. Other images may be protected by copyright.

How to add an image to your event:

1. Visit www.quality.org/branch-resources and download an image from the Eventbrite stock images section
2. Save to your computer
3. From the Details section in Eventbrite, click to add main event image, select the image saved to your computer and select Open / Save

Event summary:

Engage attendees quickly with a short summary. Include the most interesting and most important information in the summary (up to 140 characters)

Example:
Understand the changes being brought about by the new GDPR legislation and explore a practical approach to ensuring compliance

Add more details in the event description:

This is your chance to convince people to attend your event. Provide as much detail as you can in this event description. You could include the following:

Details about what problem or opportunity the event presents

Expand on your summary by explaining how your event will benefit the attendee. Try to include practical examples.

List the learning outcomes

Using between three and six bullet points, identify how this event may contribute to members' CPD. All events should present an opportunity for attendees to learn something new, practice a skill, or share their experience and as such constitute valuable CPD.

Identify which competency areas the event is most relevant to

List out the areas of the competency framework which this event relates to. This may benefit more than one area.

Identify who the event is most relevant to

Even if your event is available to everyone, it is helpful to describe who will benefit from this event. For example, are there particular job functions where this information will be most relevant, or particular stages of a person's career.

Describe the speaker:

Tell us who the speaker is and why they are suitable to lead your event. **Important:** Ensure that you have permission from the speaker to use the description. Come back and add the speaker information later if required.

GDPR Requirement - Personal data notice:

The following text needs to be included at the end of every event description:

Please Note the Following:

As there are a limited number of tickets available for this event can we ask that you cancel your ticket if you are no longer able to attend.

After the event we will send a request for feedback to the email address used to register for a ticket for this event. We will use this anonymous feedback to improve our events. A follow up email may be sent one week after the event.

On arrival at a branch event, attendees are asked to sign in. After the event the sign in sheet is used to update Eventbrite with attendance by either a branch volunteer or the PNET team.

Eventbrite will hold your personal data that you use to register for an event. The CQI will process your data up to one month after the event for the purposes of event administration. If you would like to delete your data from Eventbrite after this time you can do so by contacting Eventbrite directly.

Create your tickets:

Navigate to the Tickets section and create the following two ticket types ensuring that the 'Free' type is selected before you type in the ticket name:

- CQI / IRCA Member
- Non-Member
  - Optional additional question: How did you hear about this event?

One of our KPIs is to report on the number of member and non-member tickets sold for each branch event and creating ticket types in this way allows us to collate this data. Additionally, it provides us with a record of non-members who are interested in CQI events.

The additional non-member question allows us to understand the communication channels that are most effective for reaching non-members. Instructions on how to add this are below.

GDPR Requirement – Personal Data Notice for Non-Members:

For the non-member ticket type you will need to enter a ticket description that gives notice to the attendee of how their personal data will be processed.

To add a ticket description:

1. When creating the ticket type, select Advanced Settings
2. Add the following text in the Description field:

   By registering for this event, you are agreeing for the CQI to send you emails about their products and services. You may unsubscribe from these emails at any point.

3. Ensure the 'Visible' option is selected in the Visibility field
4. Select Save

Adding an additional question for non-member tickets:

"How did you hear about this event?"

1. Select the Order Options section
2. Select Order Form
3. Select the 'Customise Checkout questions'
4. Scroll down and select 'Add custom question'
5. Type in the Question prompt: How did you hear about this event?
6. Select the Question Type 'Dropdown' and add the following option names:
   a. Colleague
   b. CQI website
   c. Social media
   d. Quality World

   e. Other

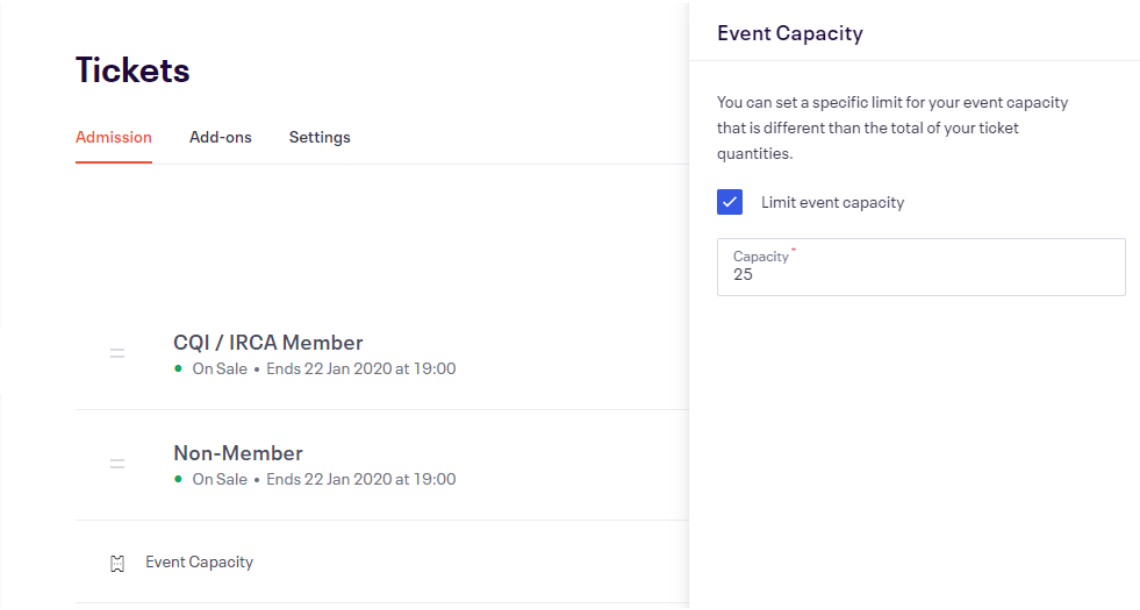
7. Select the 'Add Conditional Sub-Questions' tick box. For Sub-question 1 set the following options:
   a. If the attendee chooses: Other
   b. Ask the question: 'Please add details'
   c. Select Question type 'Text'
8. In Optional settings select the following
   a. Select the 'Show This Question For Specific Ticket Types' tick box
   b. Select Non-Member
9. Save

Ticket quantities:

To ensure that member tickets are always available if there are any spaces left for an event, the number of 'CQI / IRCA Member' tickets needs to equal the capacity of the event. By default the event capacity is set to the total number of member plus non-member tickets.

To set the Event Capacity so that it equals the number of CQI / IRCA member tickets and not the total of the ticket quantities:

1. In the Tickets section the Event Capacity is displayed underneath the ticket types
2. Click Event Capacity, select the 'Limit event capacity' tick box and type in the capacity of the event

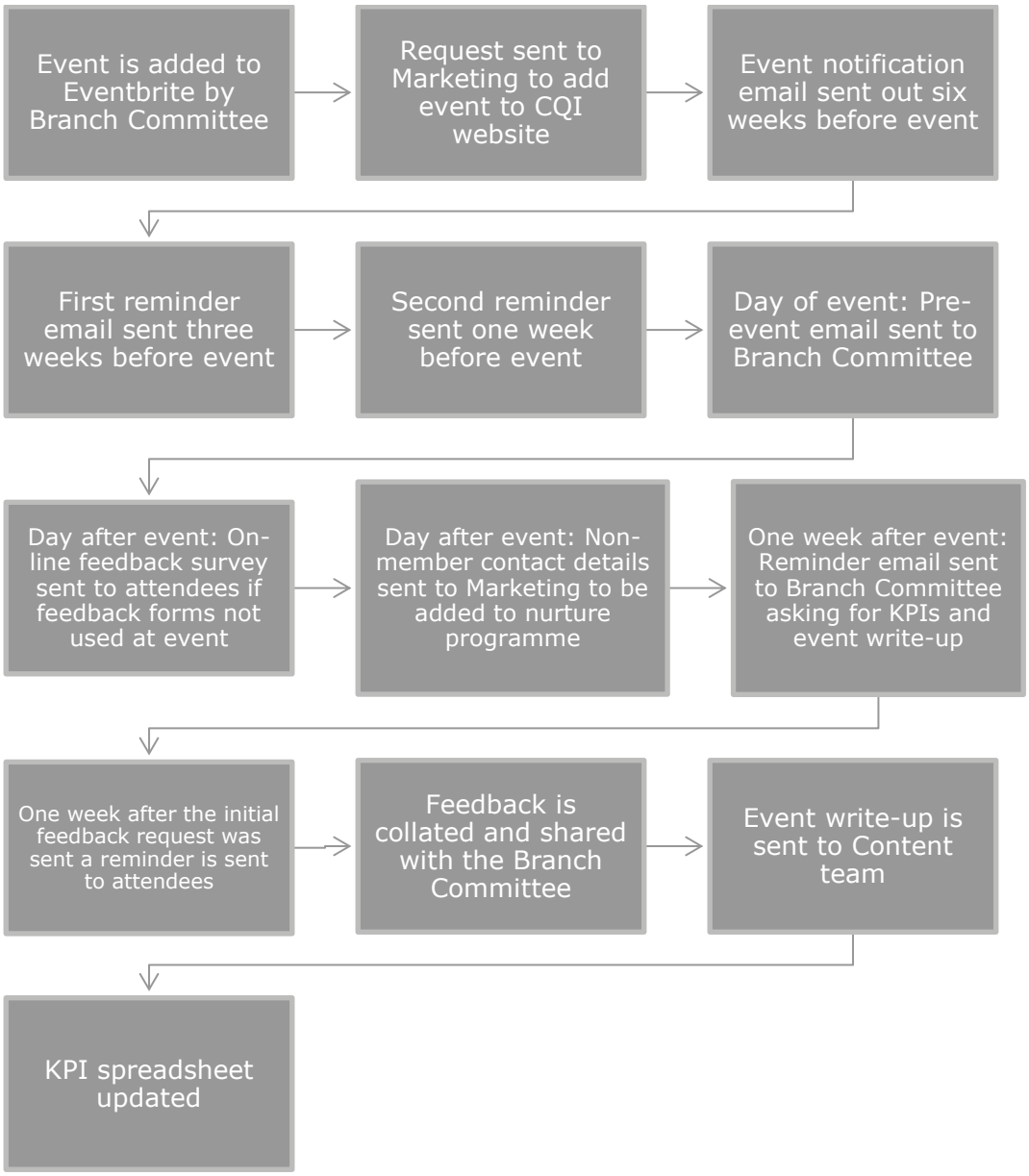


3. Save

For other tips and tutorials, visit the Eventbrite Support pages: www.eventbrite.co.uk/support

Event promotion and support:

The PNET team promotes events by following the below process. The more time we have to tell people about your event the more members we can reach and encourage to attend.



At the event

Welcoming guests:

An important responsibility of the branch committee is to welcome both existing and potentially new members to branch events. For some people this might be their first contact with the CQI face to face.

About the CQI slide show:

A slide show which highlights what the CQI does and the benefits of membership is available to download from the www.quality.org/branch-resources section of the website and can ideally be played as people arrive for a branch event.

Health and safety:

Each venue will have a different process in place but please ensure that you give the appropriate health and safety announcements at the start of each event highlighting where the nearest fire exits are and if there are any planned alarms.

Use of social media by attendees at an event:

We of course encourage attendees at events to post about the event on their social media. However, it is good practice for an announcement to be made at the start of an event letting people know good etiquette around posting other people's ideas or images. Please remind attendees that if anyone posts an image of someone else it is courteous to ask their permission first.

Marketing materials:

The CQI can provide branches with the following marketing materials:

- Pens
- Pin badges for committee members
- Leaflets about CQI services e.g. membership, training and offers
- A banner promoting your branch

This is part of the 'Branch in a Box' initiative and as well as the above we can provide the branch with a USB which contains useful documents and templates.

Branches which require additional material should contact branches@quality.org.

Photography and recording at events:

If you are taking any photos or recording at an event you must notify attendees before the event as well as putting signage up at the event. It must be made clear that if someone does not want to be photographed or recorded that they must know who to notify. Both the event photography and event recording GDPR notices can be downloaded from the www.quality.org/branch-resources section of the website.

There are guidelines about how to use GoToMeeting and also the recording of events on the branch resources page. If you are photographing and / or recording a speaker you must get their written consent before the recordings can be shared with anyone. A consent form is included in the Speaker Agreement.

After the event

Event evaluation:

After each branch event we ask the branch committee to distribute feedback forms to attendees. Any completed forms should be sent to the PNET team by post or by scanning and emailing. To increase the level of feedback the PNET team will send out electronic feedback forms to all event attendees the day after the event or as close to this as possible. Any feedback received will be collated by the PNET team and shared with the branch committee. A summary of feedback from all events will be submitted by the PNET team to the Regional Steering Committee each year for inclusion in the Annual Region Report.

Branch event reporting forms:

To make sure that we collect all the information we need to celebrate the success of the branches and to seek improvements we need some information about your events. On the day of your event you will be sent a reporting form asking for this information. We want to make this as easy as possible, therefore if it is easier for you please phone us on 020 7245 8564 to give us the required information, if no one answers please leave your information on the voicemail.

KPIs:

The PNET team and the Membership Council has defined a set of key indicators to help determine the performance of the branches, to identify where additional support may be required, and to highlight successes and examples of good practice. The information from the branch event reporting form helps us to collect this data.

Attendee numbers:

This is one of the key pieces of information we report on for each event. Please let the PNET team know who attended by either updating Eventbrite by checking in attendees or sending through a copy of the signing in sheet.

Event write-ups:

Sharing success stories with other branches and the wider CQI membership will raise the profile of branches and provide opportunities to share best practice. Branch committees are encouraged to produce a short write-up of each event and send it to branches@quality.org. The article may then be shared via our print and digital media. A brief for writing up about an event is available here www.quality.org/branch-resources and is also sent out to the branch committee on the day of the event.

CPD certificates:

CQI members do not need to provide CPD certificates for their CPD logs, instead members should be recording their own learnings in their action plans. Therefore, you do not need to issue CPD certificates to every event attendee. If someone requires one for a specific reason you can treat these case by case and

send them as one offs. If you are sending out CPD certificates you can find the template form on the branch resources page www.quality.org/branch-resources

Speaker certificates:

Similar to CPD certificates, the speaker(s) at an event may want to have a certificate to say that they spoke at an event. This evidence could support them in regrading or showing additional contribution to the profession. There is a template for this on the branch resources page www.quality.org/branch-resources