The CIPR Budget Manager Role

Group Budget Managers play an important role within the CIPR to ensure that all group income and expenditure can be accounted for correctly.

A Group Budget Manager does not require any financial expertise, but the role does require good organisational skills and attention to detail.

Budget Manager responsibilities:

1. To monitor the Groups' bank account, ensuring that sufficient funds are available to make Group payments, and that expected income is received in a timely manner

2. To pay the legitimate expenses of Group committee members and others in line with CIPR's expense policy

3. To pay supplier invoices/costs incurred by Group activities (e.g. event venues, catering, etc)

4. To ensure that all income and expenditure transactions have supporting documents which can be forwarded to groupaccounts@cipr.co.uk for the monthly reconciliation

5. To raise pro forma sales invoices and VAT receipts for group sponsors and sales event bookings when required

6. Managing debt

7. To help committee members prepare a financial plan and monitor progress against it throughout the year

8. Report on group finances at AGM

How the CIPR supports Budget Managers

Induction and training:

- In addition to the standard onboarding all volunteers receive; Budget Managers will receive a tailored welcome email from the HQ Finance Team detailing your Bankline (CIPR banking platform) access. They will also share a copy of the:
  - Budget Manager Guide

- CIPR expense policy
- Volunteer expense claim form
- Pro-forma and VAT receipt template
- Group funding proposal template
- Managing debt template
- AGM script

- All new Budget Managers are offered an induction call via Teams with a member of the HQ Finance Team, to go through Bankline and key aspects/ expectations of the role.

  The outgoing Group Budget Manager will normally have a handover session with the new Group Budget Manager also; this is organised within your committee.

- The Volunteer Team are currently exploring provision of an annual professional development session for Chairs and Budget Managers, to provide introductory level training in financial awareness/budgeting skills. We aim to begin these sessions in 2026, details to be confirmed.

- All group committee members (excluding non-CIPR members) have access to free or discounted CIPR training, including limited Chartership places and a special 'volunteer rate' for the CIPR conference (please email volunteersupport@cipr.co.uk for more information).

- All group committee members who carry out their roles as planned can claim 20 CIPR CPD Points.

Ongoing support and communication:

- The HQ finance team are available to help with any queries related to group finance transactions, finance policy and Bankline via GroupAccounts@cipr.co.uk (or over Teams/ telephone if required).

- The finance team will be in touch once a month to request for specific documents required for the previous month's group bank transactions.

- An updated Budget Manager Guide (and any templates) with any minor changes will be emailed on a quarterly basis to all Budget Managers if required.

- For any important/ major changes to group finance policy/ guidance, an email will be sent to all Budget Managers on an ad hoc basis, along with any updated guide/ templates.

- Budget Managers will be emailed annually with regards to group funding/ budget proposals (template provided).

- A finance summary script for the year can be provided by HQ if required for the group AGM.

The Volunteer Support Team are also on hand to support Budget Managers as part of their overall committee, including provision of general advice and resources to carry out group activity, and our annual volunteer recognition awards. Contact the team via volunteersupport@cipr.co.uk.