

IMA BRANCH INFORMATION

General

Every member is assigned to a region by their address location. However, not all regions have active branches. Those that have an active branch have an elected committee who work to promote mathematics in their area by organising activities for members and non-members. Branch Committees are consulted by Institute Committees when seeking members' views, advice or information.

Branches are an important part of the Institute and help to meet the Institutes objectives of promoting mathematics and its applications. Activities are run by members with funding derived from Institute membership subscriptions.

Branches are funded by grants from the Institute. Amounts will vary depending on the number and type of activities organised. The Institute's Finance Committee agrees an overall budget each year. The distribution of this budget depends on the nature and number of activities organised each year.

Every Branch must have its own business account. Statements of income and expenditure must be submitted every year as part of the annual audit of accounts.

A Branch Representatives meeting is held each year at De Morgan House. The meeting reviews activities and informs committee members of relevant developments within the Institute. Branches are invited to send at least one committee member.

Administrative Support

Whenever possible, staff and resources at Catherine Richard's House are available to assist branches. The main assistance given is with advertising branch events but support requested does vary between branches.

Advertising

The following are available for publicising branch events:

- Branch Activities Section in the *Update* supplement of *Mathematics Today*.
- Email to all branch members.
- Posters mailed to those members who do not have a listed e-mail address.
- Branches section of the IMA Website. Some branches have their own site.

- Inclusion in the e-Bulletin which is sent to all members with listed e-mail addresses.

Some branches retain address lists for mailing their own members.

Data Protection

The Institute observes the Data Protection Act. Any information about members can only be passed on if it is to be used for Institute business. The rule applies regardless of who asks for the information.

Finance

Accounts: Each branch can choose to hold its own bank account or claim expenses from the Institute.

Bank accounts must be small business accounts which will incur transaction charges.

Expenses claims should be notified to the Finance Officer in advance.

Financial information is required each year and branches are usually notified at the beginning of January. All information must be submitted before the third week in January when the annual audit of accounts takes place.

Branches with their own accounts must supply the following:

- A statement of income and expenditure for the year to 31st December.
- A copy of a bank account statement which shows the balance at 31st December.
- Any available receipts which could possibly be used to reclaim VAT.

In addition, an estimate of expenses for the year ahead and possible claim dates must also be submitted.

Expenses: The cost of activities should be considered when planning branch meetings as it is desirable to have a balance between local and non-local speakers. Travelling expenses can be paid but it is Institute policy not to pay fees to speakers unless they are delivering tutorial courses.

As the Institute is a registered charity the legislation which took effect in 1997 requires that only transactions related to the Institute's charitable objectives can be passed through a branch bank account. The objectives are to promote mathematics and its applications. Hence, purely social events cannot be processed through branch accounts. **The profitability or otherwise of events is irrelevant – it is the purpose for which money is received or spent that is important.** Entertaining speakers after lectures can be treated as part of the cost of holding the lecture. Similarly, if an after dinner speaker is

invited to a branch dinner, providing the speaker's topic is related to the Institute's charitable objectives, the cost of the speaker's meal can be met from the branch account.

Income: Requests for funds must be made in writing and must contain an explanation of how the money will be spent. On receipt, records of previous payments will be checked but the aim is to settle requests without delay.

Where whole year budgets are submitted but only part of the sum is requested immediately a further written request must be made before payment of the remainder is settled.

Publicity for Branch Meetings

The IMA advertises branch events directly to members by Email or by post. In addition they are also featured in '*Mathematics Today*', '*Update*' (the supplement to '*Mathematics Today*') and the E-bulletin.

Information and posters for branch events should be sent out by CRH two weeks before an event. Members with email addresses are sent the posters as a file attachment. All other members are notified by post.

The IMA website contains all the current information regarding branches. Changes are made when new events are notified, events listed have taken place and branch contacts or their details change.

Some branches have their own website which also contains information on events.

Further information

Further information about branches in general or financial matters can be provided on request.