



Regions Handbook





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Thank-you for volunteering for your CIBSE region.

This handbook is designed to tell you all you need to know about how to run a CIBSE region and deliver activity for your members.

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Contact regions@cibse.org for support at any time.



The CIBSE Regions

The CIBSE regions connect, inform and inspire our members and the wider communities in which they live and work. They give our members a local professional network, delivering technical and social activities in their local area.

A CIBSE region's members are the CIBSE members (of all grades) who live and/or work in their region.

CIBSE has 20 regions:

- [Australia & New Zealand](#)
- [East Anglia](#)
- [East Midlands](#)
- [Home Counties North East](#)
- [Home Counties North West](#)
- [Home Counties South East](#)
- [Home Counties South West](#)
- [Hong Kong](#)
- [Ireland](#)
- [MENA](#)
- [Merseyside and North Wales](#)
- [North East](#)
- [North West](#)
- [Northern Ireland](#)
- [Scotland](#)
- [South Wales](#)
- [South West](#)
- [Southern](#)
- [West Midlands](#)
- [Yorkshire](#)

“Volunteering with CIBSE has greatly broadened my understanding of the local engineering and construction industry.

This journey has been personally rewarding and professionally enriching, allowing me to learn, connect, and give back in meaningful ways. I strongly encourage others to volunteer, as it offers valuable opportunities to develop skills, share expertise, and support our industry's future.”



Ethan Poon
Chair, CIBSE Hong Kong



Governance

Our governance sets out how a CIBSE region is created, who its members are, how it should be run, who should be on its committee and how they should be elected.

All regions should operate in line with our governance.

Download a copy of our regional governance from the [Volunteer Resource Hub](#). This handbook provides a concise summary of key governance elements for easy reference.

The regional committee

Each region is led by a dedicated committee of volunteers whose role is to organise and deliver activity in the region to engage their members. They are elected from the region's membership by the region's membership.

The committee is made up of four officers (a Chair, Vice Chair, Honorary Secretary and Honorary Treasurer) and a suggested four to eight elected members.



Sarah Boylan

Honorary Secretary, CIBSE Ireland

“Volunteering with CIBSE has helped me grow both professionally and personally. I have developed many skills like communication and event organisation and have gained a wealth of technical knowledge. It has given me a chance to meet people that I may not have crossed paths with otherwise helping me to build a strong, supportive and valuable network.

It is great to see positive impact this work has on others and would encourage anyone to get involved. It is a great way to give something back whilst further developing your career.”



The Committee - Officers

The officers of a committee direct the operation and activities of a region.

All officers must be corporate members of CIBSE. Officers are elected for three-year terms and may serve in any single officer role for up to two consecutive terms. They may also hold different officer roles consecutively, for a combined maximum of 12 years of continuous service. Officers who take a break from service as an officer may become eligible to serve again, including by returning as an elected member.

Whilst each committee may have only one Chair, the roles of Vice-Chair, Honorary Secretary, and Honorary Treasurer may be shared to support greater inclusion and enable broader participation.

Chair

The Chair provides leadership, representation and direction for the region and its committee.

Their main responsibilities are to:

- Chair regional committee meetings.
- Oversee the activities of the committee.
- Represent the views of their members and committee.
- Represent the region at the CIBSE RLC and Council meetings.
- Keep the committee and members of the region informed about relevant CIBSE updates and activities.
- Generate enthusiastic local support for the region and CIBSE.

Vice Chair

The Vice Chair provides support for the Chair in carrying out their role and can deputise for the Chair.

As part of succession planning, Chairs should ensure that their Vice Chair gets exposure to the duties of the Chair so that they are familiar with the role when they succeed them.

The Chair is invited to the Regional Liaison Committee (RLC) and Council meetings, held three times a year.

The **RLC** is made up of all the regional Chairs and is chaired by the CIBSE President Elect. It is a forum for the regions to discuss ideas, initiatives and issues and receive updates from CIBSE. Chairs will be asked to submit a report on the latest activity in their region ahead of the meeting. The **Council** is CIBSE's consultative and representative body and works with the Board to add value to the governance of the Institution. All regional chairs are members of the Council.

Honorary Treasurer

The Honorary Treasurer is responsible for managing the finances of the region.

Their main responsibilities are to:

- Manage the receipt, safe keeping and disbursement of regional funds as authorised by the regional committee.
- Monitor the expenditure of the region and keep adequate records.
- Work with the Chair to prepare the region's annual grant funding request.
- Submit the end of year financial return to CIBSE every January and provide any necessary additional information requested.
- Keep the committee informed of the financial condition of the region.

Honorary Secretary

The Honorary Secretary provides the committee with administrative support and ensures that it is operating in line with its governance.

Their main responsibilities are to:

- Work with the Chair to prepare agendas for committee meetings and circulating the invitations, papers and minutes for them.
- Take minutes for committee meetings.
- Advise the Chair on governance.
- Keep committee records.
- Keep track of all the property of the region (for example: marketing collateral, pop-up banners).
- Coordinate the AGM and nomination process for the committee.

Succession planning

The nominations process is a good way to bring in new committee members, but it's also important to think ahead. Officers should look for potential successors for their roles and offer support, training and the opportunity to gain experience. This contributes to the long-term health and sustainability of the committee. It ensures that roles and responsibilities are continually filled by capable individuals who understand the aims and purpose of the region.

“I enjoy the camaraderie that comes with being part of a group of people that are all trying to make sure our region thrives and puts on worthwhile events for all those involved in the Building Services and Built Environment community.”

Neil Baines

Committee Member, CIBSE Merseyside and North Wales





The Committee - Elected Members

The elected members on a committee deliver activity in the region. They can choose to focus on specific areas, such as organising events or coordinating policy consultation responses, or they may choose to get involved in all the activities of the committee.

Elected members must be a member of the region. They are elected for one-year terms and can serve as an elected member for a maximum of 12 consecutive years. Elected members who take a break from service as an elected member can become eligible to serve again – this can be by serving as an officer.

There should be four to eight elected members on a committee.

Elected members can get involved in activities such as:

- Organising technical events
- Organising networking events
- Coordinating a region's social media
- Creating newsletters
- Coordinating policy consultations
- STEM outreach
- Mentoring
- Membership promotion

Some committees prefer to assign elected members dedicated roles (i.e. social media coordinator) to focus the committee's activities, others prefer for elected members to get involved across a range of activities. It is up to each committee and elected member to choose what works best for them.

Volunteering at CIBSE

Following their election, new committee members will be invited to an annual induction by CIBSE. Committee members are encouraged to support newcomers to their committees by inducting them at a committee level, helping to ensure local knowledge is also passed on.

Committee members will also be given a copy of the [Volunteer Handbook](#), which sets out what volunteers can expect from CIBSE and what CIBSE asks for in return and contains helpful resources for volunteers.

Equity, Diversity and Inclusion

We believe that an inclusive culture fosters resilience, creativity, and innovation – qualities that deliver both better buildings and a stronger building service engineering community.

Our [Inclusivity Guidance](#) contains tips for ensuring that regions and their committees are as inclusive and welcoming as possible. CIBSE's [EDI Panels](#) are also available for guidance and collaboration.



The Committee - Non-Elected Members

Non-elected members also sit on the committee to support members and activity in a region.

These members do not need to be elected in a region's AGM, as they will be elected through their own committees and organisations.

Standing members

Standing members are appointed to a regional committee to represent another committee or network. This helps strengthen collaboration across groups. They may come from another CIBSE network or a relevant external organisation.

Standing members may also lead sub-committees in the region focused on their area of expertise.

They are responsible for reporting to the region on the activities of their 'home' network and sharing relevant regional updates with their home network in return, ensuring both groups stay informed about each other's work.

Regional Almoner

Regional Almoners are appointed by the [CIBSE Benevolent Fund](#), a charity that supports CIBSE members and their families during challenging times.

The main responsibilities of the Regional Almoner are to help individuals access support services, arrange financial assistance for those in need, and provide a steady presence and sympathetic guidance to those seeking help.

They will sit on the regional committee as a standing member, and work with the regional committee to identify those in the region in need of help.

Honorary Independent Examiner

Each year, a region must have its financial return reviewed by an Honorary Independent Examiner.

An Independent Examiner does not need to be a paid-for accountant/auditor, but they do need to have a level of financial knowledge to enable them to understand and review the accounts.

They must be able to demonstrate impartiality and therefore not be involved in the current committee. The committee is responsible for recruiting their examiner.



Committee Structures

To help coordinate the activity of the region, regional committees can create subcommittees, panels and working groups to focus on key areas.

They should be chaired by an elected member of the committee, but the other participants are not required to be committee members. They should have a clear purpose, membership and length of operation – for subcommittees, these will need to be expressed in their Terms of Reference. A template for these can be found on the [Volunteer Resource Hub](#).

Subcommittees

- Focus on a general area that supports the main committee's goal.
- Ongoing, but members are reaffirmed at regular intervals (i.e. annually).
- Meet at regular intervals to carry out tasks set by the main committee.
- Most suitable for annual or ongoing activity, such as organising a conference or gala.

Panels

- Provide expert advice to the main committee to inform decisions.
- Ongoing, members can join or leave as required.
- Meet on an ad-hoc basis, generally to advise on relevant issues or specific topics.
- Suitable for providing technical knowledge, such as input into a conference agenda.

Working groups

- Focus on a specific task.
- Time-bound from creation until completion of task.
- Meet at regular intervals to ensure the timely completion of the task.
- Most suitable for one off activities, such as a policy consultation response.



“Volunteering allows me to connect with others, share my skills, and make a meaningful impact. It is always a truly rewarding experience personally and professionally. It has broadened my perspective, boosted my confidence, and bought genuine joy through connecting with others.”

Yasser Ali Khan

Honorary Treasurer, CIBSE MENA



Committee Meetings

Regular committee meetings are a vital part of keeping the momentum and connection of a committee alive.

Holding effective meetings

Effective committee meetings:

- Are regular - we recommend meeting at least quarterly.
- Have a clear agenda - everyone should know why the meeting is happening and what to expect.
- Include the right people - think about who really needs to be there. If someone isn't expected to contribute, it's okay to leave them out. If someone's input is important, make sure they're invited.
- Encourage everyone to take part - create a welcoming space where all voices are heard and avoid letting just a few people dominate the conversation.
- Stick to time - everyone's time is valuable, especially for volunteers.
- Focus on outcomes - meetings should have a purpose and generate ideas and actions that are completed between meetings.
- Have clear notes - make sure minutes include key points, actions, who's responsible, and deadlines.

Writing effective minutes

All committee meetings should be minuted, with these shared with the full committee (whether they attended or not) and stored within the network (i.e. sharepoint, teams).

Effective minutes are:

- Clear.
- Concise.
- A summary of a discussion, not a transcript.
- Focus on action points, owners and deadlines.



Electing the Committee

A regional committee is elected at their Annual General Meeting (AGM). This must be held between 1 March and the date of the CIBSE AGM in June each year.

Committees must follow the following process for organising their AGM:

**12
weeks
before**

The committee set the date, time and venue for their AGM. They confirm which roles are open for nominations and who they are nominating for the roles. This information is sent to regions@cibse.org.

**8
weeks
before**

CIBSE sends the calling notice to all members of the region. This tells them the details of the AGM and the available roles. Members have 14 days to nominate themselves for the available roles.

**5
weeks
before**

The committee have 7 days to review the nominations and raise any concerns.

**4
weeks
before**

If required, CIBSE will organise an election for roles with more than one nomination.

**Day
of
AGM**

The region holds their AGM, where the Chair must inform the region who will be on the committee for the year ahead. The region's accounts must also be presented to the members at the AGM.

AGMs can be held in person, online, or as a hybrid meeting. Regions can choose to make time for networking, add a technical presentation to the agenda, or any other activity they wish to add to their AGM - this can encourage higher attendance from the membership.

Find a template AGM agenda on the [Volunteer Resource Hub](#).



Activity

Regions are encouraged to plan activities that connect with and involve their members. They receive funding through annual grants from CIBSE and can also raise additional income through sponsorships and event ticket sales.

Activity planning and grant funding process

Each year, regions plan their activities, set a budget, and request grant funding from CIBSE through the activity planning and grant funding process, which runs from July to September.

The Networks and Engagement Team will send a planning and funding form to the committee. It's important that committee officers lead the completion of the form, working closely with the rest of the elected members to ensure everyone's input is included.

What activity should a region be doing?

When planning activity, regions should consider their purpose and the interests of their members.

Common activities for a region are:

- Technical seminars and conferences
- Events to promote CIBSE membership
- Responding to policy consultations
- Awards recognising professional excellence
- STEM outreach
- Mentoring
- Social events

The regions have a strategy which demonstrates how they support CIBSE in achieving its aims through the activity they deliver for their members. Consider the strategy and how the planned activity contributes to it. The strategy can be downloaded from the [Volunteer Resource Hub](#).

The [Volunteer Resource Hub](#) contains guidance on delivering many types of activities, including organising events and participating in STEM outreach.



Funding

The regional funding formula sets out the amount of grant funding support a region will receive each year.

CIBSE will contribute funding towards technical and membership development activity.

We recognise that social activities such as annual dinners and golf days are a great opportunity for members to network and build the profile of the regions, however these activities fall outside of CIBSE's charitable objectives and therefore CIBSE resources and funds are unable to be used towards them.

Funding can be given for events with both a technical and social element, such as a technical seminar with networking activities after.

CIBSE will award grant funding to each region based on the regional funding formula:

- £1000 towards operating costs for the regional committee.
- £1000 towards operating costs for the region's YEN committee.
- A contribution of £500 per technical event or membership development event.
- Regions can submit additional funding requests for one-off special activities that support CIBSE's and the regions' strategic goals but do not fall under the above categories.

CIBSE is a charity and therefore has a legal duty to spend its income within a reasonable time of receipt. If a region's bank account, at the time of making a grant funding bid, holds more than 75% of the total amount of funding requested, the amount of grant funding awarded will be reduced by the excess balance.

A	Current bank balance	8,000	
B	Grant funding application	10,000	
C	75% of application amount	7,500	$C = 0.75 \times B (0.75 \times 10,000)$
D	Reduction of application amount	500	$D = A - C (8,000 - 7,500)$
E	Grant funding awarded	9,500	$E = B - D (10,000 - 500)$

This does not apply to sponsorship funds donated for specific activities which are held in the region's accounts.



Bank Accounts

Each region has its own bank accounts and administers its own funds.

CIBSE provides each UK region with a NatWest bank account under its parent account, into which its grant funding will be paid. This account should be used for all income and expenditure related to technical activities. At least two officers should be named as approved users on the account to ensure proper oversight and ease of access to funds. Global regions have an account with a local bank.

The Honorary Treasurer is responsible for managing the account and must keep accurate records of all transactions. These records should be detailed enough to help the Treasurer to complete the annual financial return (due to CIBSE by 15 January each year) and track the region's financial performance against its agreed budget.

It is a legal requirement for each region to retain evidence of all income and expenditure, including invoices and VAT receipts, for six years. This is essential for proper financial reporting.

Please note:

- All funds held or used by a region are considered part of CIBSE's overall funds and must be included in the Institution's annual accounts.
- As part of a registered charity, regions must ensure that all financial documentation is readily available in case of review by CIBSE's annual auditors.

The form for the financial return will be circulated to all regions prior to 31 December, and these must be submitted to CIBSE by 15 January each year. The financial return must detail all income and expenditure made from the region's technical bank account. Prior to a region's Annual General Meeting, a copy of the return and accounts should be examined by the region's Honorary Independent Examiner and a report on the accounts presented at the AGM.

Grant funding will be paid as early as possible in the year once CIBSE has received the region's financial return form.

A separate bank account should be kept by the region for its social funds. This is any activity that does not include a technical element or contribute to CIBSE achieving its aims. These funds are not considered part of CIBSE's accounts, and do not need to be included in the financial return.

Expenditure

Regional committees may choose to reimburse volunteers and speakers for expenses they incur while supporting the region. These reimbursements should be for reasonable and necessary costs that are clearly out-of-pocket (not already covered by another source). It's up to each committee to decide the appropriate level of reimbursement. The region's approach to expenses should be clearly communicated to all new committee members at the start of each year. To ensure transparency and proper record-keeping all expense claims should be supported by a written request and receipts.

Costs incurred by regional chairs when attending official CIBSE meetings, such as the Regional Liaison Committee (RLC) and Council, will be reimbursed directly by CIBSE. The expenses claim form can be found on the [Volunteer Resource Hub](#).

Many employers are supportive of CIBSE's work and are often willing to cover volunteering-related expenses. Committee members are encouraged to check with their employer and seek support where possible.

Income

There are a variety of ways that regions can generate additional income to fund activities. These are:

- Charging attendance fees for events.
- Seeking sponsorship from commercial organisations.
- Seeking sponsorship from the CIBSE Patrons.

The CIBSE Patrons are a group of businesses who collaborate to give financial and technical backing to a wide range of initiatives led by the Institution. The CIBSE Networks and Engagement Team can support committees in requesting sponsorship from them.

Supporting YEN

CIBSE's YEN (Young Engineers Network) committees rely on their local regional committees for their banking as they do not hold bank accounts themselves. The regions should assist them with the handling of any income or expenditure as required. Regional technical funding accounts should be used for this purpose.

CIBSE YEN networks apply for grant funding through their local region. During the application process, regions should ensure they are working with their local YEN committee to include their requested funding in their application form.



Engagement

A region's members are the CIBSE members who live and work in that region.

CIBSE cannot share members' contact information with regional committees due to the requirements of GDPR, but we can share certain demographic information to help committees understand the make-up of their regions.

This can include a combination of:

- Overall numbers
- Membership grades
- Town/city locations
- Gender

Engaging with members

There are several ways regional committees can engage with their members:

- Email accounts - all regions are provided with a Microsoft Outlook email account which can be used to communicate with members.
- CIBSE website - all regions are provided with dedicated webpages on the CIBSE website which committee members may edit and update to promote their region, advertise upcoming events and profile committee members.
- Social media - regions are encouraged to build social media profiles to engage with their membership.
- CIBSE Journal - regions can request that their event be featured in the CIBSE journal.
- Email bulletins and newsletters - CIBSE can send email bulletins and newsletters to the regional memberships promoting upcoming events (3 weeks' notice of an event is required).
- Surveys and polls - CIBSE can send a survey to the membership to help regional committees understand their members' wants and needs.
- Feedback and metrics - checking-in event attendees and using feedback forms can provide insights into what activities are popular with members and what they would like to see in the future.

The [Volunteer Resource Hub](#) contains guidance on using social media, promoting activities and more to engage members.



Resources and Support

The CIBSE Networks and Engagement Team is always here to support regional committees and volunteers.

The [Volunteer Handbook](#) contains information on volunteering with CIBSE, helpful resources for volunteers and where to find them, and sets out what volunteers can expect from CIBSE and what CIBSE asks for in return.

The [Volunteer Resource Hub](#) contains helpful guidance, policies and procedures related to running a region and volunteering with CIBSE.

Annual inductions are organised to support volunteers in their roles, which new and current volunteers are encouraged to attend. Past recordings can be found on the [Volunteer Resource Hub](#).

Each region is supplied with a Microsoft 365 account, providing them with an email address, Sharepoint and Teams. The Networks and Engagement Team can provide login details.

The CIBSE Networks and Engagement Team is always available if volunteers have any questions or need any support. Contact them at regions@cibse.org.

Key dates for the CIBSE regions

- RLC and Council take place three times a year (circa February, June and October).
- The President's Awards Dinner is on the second Friday in October.
- The region's AGM must take place between 1 March and the CIBSE AGM.
- The activity planning and grant funding process takes place between July and September.
- The financial return deadline for regions is 15 January.



Resources and Guides

You can find helpful resources and guides on how to get involved in all these activities and more on the [Volunteer Resource Hub](#)

Can't find a resource? Contact regions@cibse.org for help and advice.



Checklist

This checklist is designed to help you quickly check if your region has everything in place to run effectively.

Committee

- Are all officer positions filled?
- Are there a sufficient number of elected members?
- Are all committee members aware of their roles and responsibilities?
- Have all committee members attended inductions and received a copy of the Volunteer Handbook?
- Are the committee holding regular and effective meetings?
- Has the committee established an effective method of communicating with each other outside of meetings?
- Is there a succession plan in place for the officer roles?

Activity and engagement

- Does the committee have an annual activity plan with regular activity scheduled?
- Are all committee members aware of the activity plan and their roles in contributing to it?
- Are all activities uploaded onto Eventbrite and promoted to members?
- Is the committee regularly communicating with its members?

Finance

- Do the committee have an annual budget?
- Is the Honorary Treasurer tracking the region's progress against its budget, and are all committee members aware of their roles to play in meeting it?
- Do the Honorary Treasurer and two other committee members have access to the bank account, and know how to approve expenditure?
- Is the Honorary Treasurer keeping sufficient record of all regional income and expenditure to complete the region's annual return?
- Does the region have an Independent Honorary Examiner?

Resources

- Are committee members aware of the Volunteer Resource Hub?
- Do the committee have access to their Microsoft Account, including their Outlook email account?
- Do the committee know how to edit their webpages?
- Do the committee have access to Eventbrite, and know how to use it?



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