

TR REGISTER LOCAL GROUP

‘HOW TO’ GUIDE



2020

INTRODUCTION

This pack of information is intended to help you with your important role as local TR Register Group Leader or Group Committee. It is not intended to be a set of rules but a set of guidelines to assist you. Any questions regarding anything in this document should be addressed to your local Group Area Director or to the TR Register Office.

The TR Register is organised into local Groups because that is the best way it can serve the needs and interests of its members. The local Group has no legal standing but because it affiliated into the TR Register, it is expected to share its objectives. The most important objectives are:

- To forward the aims of the TR Register.
- To provide a focus within a geographical area for the activities and events of the TR Register and its fully paid-up members.

Local Groups play a hugely important part in the life of the TR Register. Members that are in contact with the local Group benefit not only for the social activity and events organised at local level but also from the wealth of experience about TRs contained within that Group. This experience can help when finding suppliers and overcoming the technical challenges that are part of owning a classic car.

Local Group Overview			
	What is done	How it is done	Why it is done
1	Promote enjoyment of the TR Register	Holding regular meetings and events	To ensure the club prospers
2	Bring together the membership	Ensure regular meetings that are well placed to serve the whole Group, interfaced with varied events and social gatherings.	Furthering the aims of the whole of the membership's needs, including the use of the TR sports car.
3	Help and advise members	Identify local/national services and specialists Identify specialist knowledge within the Group.	To ensure all members can enjoy owning and using a TR sports car.
4	Administer Group activities	Organise meetings and events calendar well in advance Have effective communication system within the Group Keep up to date accounts	To ensure the transparency of the Group and Club's affairs
5	Communicate and feedback to membership	Addressing Group meetings Regular Newsletters Up to date Web pages Attending GLs meetings Editorial for every TR action Keep the local Area Director up to date with Group activities.	To ensure there is a vibrant social scene on offer for all members.

GROUP LEADER OR GROUP COMMITTEE

An officially recognised Group must have a Group Leader or Group Committee who are paid-up full or Family member(s) of the TR Register. The Group Leader or Group Committee is/are the member(s) of the Group who are responsible for the day-to-day general running of the Group in the area which his or her local Group covers. The following paragraphs amplify Group Leader or Group Committees' responsibilities.

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1. HOW TO STRUCTURE A LOCAL GROUP

Whilst there are no hard and fast rules on the formal structure, successful Group committees can comprise of a Group Leader or Group Committee, Treasurer, Membership etc. and full Committee, for example Kennet Valley:

Meet the Team



Phil Horsley - Group Leader/Regalia/Webpages



Starting my career as an electrical apprentice, I always wanted a TR after working for the bosses son who was bought a brand new red TR6 which he gave me a lift to work in, and being the first experience of having a 'crick neck' from acceleration I was smitten. In 2000, I attended the TR International and ended up buying a 1967 TR250 (so I got that 6 cylinder power) and she is still my favourite and now fully restored a car I am really proud of, I joined the Register just after purchasing and then the committee in 2004 organising the Regalia. Since then I have acquired three Grinnall's, a TR7 V8 and a couple of TR7 restoration jobs which means I have had to rent lots of lock ups. I am very passionate about TR's and in my role want to continue the development of the KVG to give members a range of events, opportunities and social to enjoy their TR's.

Stewart Highnett - Treasurer



I started working life as an electrical apprentice, working on everything electrical from heavy industrial equipment to cars. Around 1970 I agonised over a TR6 seized fuel pump, only to discover years later as I partially restored my 6 that it was a common issue. Now busy running an industrial electrical and control panel building business and Happily finding enough time to enjoy being a committee member in the KVG group.

Michael Thomas - Committee Member & Raffle



Sally and I are both retired and living in Silchester. My working background is in accountancy in commerce, eventually retiring from Macmillan Publishers in 2012. My interest in cars came from my father who always had something oddball in his garage. My first car was an Austin Nippy from 1933, on which I cut my teeth, becoming very adept at removing the engine on a regular basis. Amongst a series of dodgy second-hand sports cars, in my younger days, were an MGA, 3 x MGB's, TR5, and a US imported TR6. Later included TVR, Stag, BMW Z1 and Z3 and an MGC. Currently a Mercedes SL280 and our Red TR6 which we bought in 2009 after discovering the hospitable welcome from the KVG team.

Michael Field - Membership/Communication



A retired self-employed engineer to the dry-cleaning industry, married with three daughters, and three grandchildren, two girls and one boy. I joined the Register in late 2000 before purchasing my first and so far only TR5 in March 2001. I have served on the KVG committee since 2003, initially helping out with the calendar layouts, but soon taking over the position of events coordinator, for eight years. As well as seeking and promoting events of interest, and keeping the membership informed of these via emails and online calendars, I have also been heavily involved in producing several newsletter formats, and sorting and updating our membership records, during my time on the committee. Retaining the membership part, I now serve as Membership Secretary and member communications. Other interests include touring Europe in our motor home, walking, computing, and genealogy research.

John Edmonds - Committee



I joined the Register in 1989 and have been on the committee since 1995, serving as treasurer for a period. I own a 1959 yellow TR3a which was imported from a scrap yard in California, which I rebuilt and converted to RHID. My interests are driving the car rather than shows, all forms of MotorSport, and I have been a Marshal on Rallies, including Internationals, for many years.

Denis Carter - Committee



I am a local boy born in Tadley and always had an interest in mechanical items which progressed to motorcycles. This was my mode of transport from the age of 16 years and went to many motor sport activities as a spectator. When I was in my 50's I became involved in classic motorcycle racing and built my own racing bike with a 750cc Triumph engine. I raced on most circuits in the UK and Europe. Val and I spent 15 years enjoying the traveling and socialising with the Classic Racing Club. When the time came to give up racing the race bike was sold and it was a joint decision to look for a classic sports car the choice had to be again a Triumph. A TR6 was found and then we were fortunate enough to find the K.V.G who were active in the pursuits we were interested in.

Emrhys Barrell - Committee



My TR connection goes back more years than I will admit to, when a friend and I shared the ownership of a TR3A. It was the only way we could afford a decent car, and the arrangement worked well, until one night Steve decided to try out the car's inverted flying capabilities. The resultant 100 yard upside-down slide planed off everything above the dashboard, including a slice of his scalp. Since the car was only insured third party, that was the end of that. Then seven years ago we were persuaded to join the KVG by Phil, and were looking for a Grinnall, when Linda & I saw a Stag, liked it and bought it. Since then we have enjoyed every minute of it, and the friends we have made in the KVG.

Whilst at the other end of the spectrum, for instance Wensum Group, which comprises of four main Group Committee members covering the roles and responsibilities:

About Wensum

The Wensum Group is the local group for members living in the county of Norfolk.

The group was formed in the early seventies and is one of the oldest groups in the TR Register. It has always had a strong membership of enthusiasts living in and around the region.

Today the group has over 120 members, many of whom use their cars on a regular basis. We organize fun runs and trips to classic car events both in the UK and around Europe, plus our social nights offer the chance to meet with like-minded people interested in building, maintaining and driving the classic Triumph TR marque. Click the green manu above to explore our pages , find details about our next local meet, view image galleries and social scene reports. Monthly meetings - every second Monday, 8.00pm at The Worlds End, Norwich Rd, Mulmarton, NR14 8JT. Alternatively, North Norfolk area every fourth Tuesday, 07.30 pm at Sculthorpe Mill, NR21 9QG.

Group Leader - David Solomon

Secretary - Mike May

Treasurer - John Elliot

Events Coordinator and Social Scene author -



Social scene archive

2019 (17)

- January (2)
- April (2)
- May (6)
- June (2)
- July (4)
- September (1)

The common factor between both these Groups is the fact that positions are filled via an electoral process conducted at the formal Group Annual Members Meeting (AMM).

Both Groups run a highly successful and varied calendar of local and nationally supported events, made possible by the inclusion of voluntary efforts from the Group membership.

LOCAL GROUP MEETINGS

Group Meetings are generally held monthly and details of timings and locations are found both in TR Action, and on the “how to find us” page on the local Group website. It is important that these regular monthly meetings take place so that any new, existing or visiting member is assured of meeting other Group members on the date published.

Along with the social gathering of the local Group members, these meetings generally comprise a more formal session where the Group Leader or Group Committee, or their deputy, reviews the recent and forthcoming events in order to ensure everyone present knows what is happening, who is involved, where and when it is happening, and to provide a platform for two way dialogue with the membership. This more formal session is essential for new members as it automatically includes everyone with the same information at the same time. Ideally it should open with the introduction of new members, by name, to the Group.

Most local Groups also hold a second or third meeting each month know as mid-monthlys, these are usually tied in with local or national events or at a different venue in the area to ‘capture’ those members who have further to travel to the monthly meeting venue.

Good practice would see this monthly meeting reported in the Group Newsletter, with diarised events being listed on the “future events” page on the website.

Meetings with other clubs are often a good way of raising more money and stimulating attendance. Regular joint meetings should be quite separate from TR Register meetings and should be seen to be separate. Possible insurance difficulties should be borne in mind.



2. HOW TO HOLD AN ANNUAL MEMBERS MEETING

Once per year, the Group can hold a formal AMM, which should be chaired by the respective Area Director, Group Leader or Group Committee. The agenda should be published circa 4 weeks ahead of the meeting and can comprise reports from each of the committee members on their respective activities and results for the year just ended, followed by the election of the club officers for the coming year. Often there is little or no opposition to the standing committee members, however it is vital that every member is provided with an opportunity to stand for office, has the platform to promote their candidacy, and that the members elected carry the authority of the members in their post. Voting should be a simple show of hands. Votes can be accepted from full and family members.

A more formal record of the AMM can be recorded as meeting minutes, and these can be published on the local Group website if required.

3. HOW TO SHARE THE LOAD



Turning this



into this

Involving the membership in the many activities will share the workload around, along with gaining commitment to getting things done with efforts materialising in the form of events and activities. Involved members benefit from their own commitment which proves contagious with others.

The converse of this style leads to cliques forming with the potential exclusion of members who may have lots to offer, but don't feel confident enough to step forward. This is often quoted as the main reason why newer members leave the TR Register.

Getting feedback from members what they would like to do is an important part of this, some members will want more technical and car related events, others will seek more social and partner participation events, so we need to be conscious of this. Getting the partner along can ensure member participation.

Family members are usually very supportive and willing to help out so should be encouraged to get involved.

4. HOW TO ENGAGE NEW MEMBERS

The TR Register is continually investing in the future of the club, winning and attracting new members at shows and exhibitions, and providing experiences and opportunities for the existing membership.

Our analysis of memberships reveals that our “stick rate” with new members has improved although like every car club, there is a gradual decrease of membership and not where we would like it to be. Retention of membership is as important as getting new members as usually once a member has been through at least two renewal cycles, they see the value of membership and generally stick with it.



The TR Register is focussed on ensuring that new members are made to feel part of the club, and have available a members Welcome Pack. Additional packs can be sent to all Group Leader or Group Committees on request.

The TR Register has seen a gradual improvement in ‘stick rate’, with improving retention rates for first renewals. By far the **greatest impact** can be made at the local Group level – when the new member attends their first local Group meeting.

The initial way new members are recognised and received within their local Group plays a major bearing on the longevity of the membership. Part of the Group Leader or Group Committee role is to ensure these new members are identified and introduced to the existing membership in a warm and welcoming fashion. This ideally would be preceded by direct contact, either by mail, email or telephone prior to the next scheduled meeting, and to assist that, the Office sends out details on a regular basis, of new members signed up to that specific local Group.

YOU NEVER GET A SECOND CHANCE TO MAKE A FIRST IMPRESSION

We should not underestimate the value of this first proactive “personal contact”. An example of an initial email (or letter) is as simple as:

Dear,

*“Welcome to ***** Group. We get together at the, on, starting at.....pm, and it would be great to meet you and provide your introduction to other members who will help you get the most enjoyment from your involvement with TR’s and the club. You can call me on or simply return this email and let me know your intentions.*

Don’t forget, whether it’s technical “know how”, social events and shows, or simply moral support, we are here to help you get the most enjoyment from your TR ownership.

Looking forward to meeting you

Best wishes

.....

Group Leader or Group CommitteeGroup”

One common reason given by people leaving the TR Register is “not made to feel part of the club”, and the first potential stumbling block is their initial experience at the local Group level. Get this ‘first-year’ part right and there is a good chance of keeping members (and friends) for a long time. Get members past their second year and they will stay for some time!

NEW MEMBERS & LAPSED/LAPSING MEMBERS

New members will be sent details of the local Groups when they join. The Group Leader or Group Committee will also be informed and should contact the new members to invite them to the next meeting (sample letter within this pack). It is also nice if a fellow member living nearby arranges to call round - preferably with their TR! Holding onto existing members is essential. However, where members sell their vehicles, efforts to contact the new owner and encourage membership of the TR Register will bear dividends.

5. HOW TO USE COMMUNICATION TOOLS EFFECTIVELY

The technology may have changed, originally from face to face, through postal, fixed line telephone, telex, magazine, fax, mobile phone, Internet and email, but the principle of communication remains constant, to pass information between people. Unfortunately, we sometimes fail to check that the messages sent via modern technology have either been received or understood, this can cause confusion and sometimes real embarrassment. However, the advantages of using modern technology are so great that we need to maximise our efforts, using email, website and the internet.

The Office In Didcot, can provide a member listing for any local Group, containing the details of all the members within their catchment area, including telephone numbers and email information. This is generally supplied in a spread sheet format and is easily updated with the information sent out monthly regarding new members and leavers. The Group Leader or Group Committee needs to sign the GDPR mandate and then should maintain accurate details of the members within their catchment area, with all relevant member information including email addresses where possible. Please ask the Office Manager whenever you require an up to date listing. The Office is also able to offer one “mail out” session per local Group per annum, if needed.

The Local Group Website is the place to go for Local Group information, and is configured for newsletters, future events and an image gallery to provide a standard platform so that any TR Register club member, or indeed any member of the public, and prospective members, can see what is on offer in our “shop window”.

The Local Group Website also provides the focal point for communicating events and activities, along with timescales. This should not preclude the distribution of the local Group information around the local Group members using email, rather it should complement the process and provide an additional channel to disseminate information.

The club magazine, TR Action, also provides a platform viewed internal and external to the club, and provides a back-up source of information for those not using the internet, **and it is important that each Group provides a regular submission to the “Social Scene”** in line with the publishing timescale for the magazine.



Each local Group has a presence and website established via the host TR Register website, and whilst it is acknowledged that individual Groups have evolved their own websites over the years, it is highly recommended that all Groups use the official website as it is the central ‘shop window’ for the Club.

There are a number of reasons for this, not least of which is consistency and awareness of the TR Register identity, internally and externally, and the fact that all Group information can be found in one format in one place.

A number of the functions of the local Group websites are maintained from the Office, and as such are always updated with the latest submissions from the social scene in TR Action without direct input locally, such that basic details about any Group could be found by anyone without input at a local level.

These centrally managed functions include the local Group home page (populated with images and information supplied by the local Group), the how to find us section (information supplied locally), with links, shop, how to join, and how to renew – all of which are common to each Group and therefore easily managed at a single point.

The gallery sections, newsletter and future events sections are completely within the control of the local Group. Images, video, links, and text are easily uploaded using the local Group editor user manual, and fully supported by contact and tuition from the Office. Details of how to use these functions follow later in this guide.

A majority of Groups are using the system, so there is no shortage of examples to check out, and in order to start using this facility, the Group Leader or Group Committee, or their delegated/nominated representative simply contacts the Office and direct communication will be established and the respective local Group websites activated accordingly. The user manual and passwords will be issued and immediate support provided on a daily basis.

We should never underestimate the power of the club magazine TR Action or the TR Register website, together with all the Local Group Websites. Viewers may not all be a TR Register member but, would all generally have an interest in our cars, and if they like what they see, they may join us. Along with shows at a local and national level, these are the club “shop windows”, so the need to keep information relevant and up to date is essential.

Membership forms and literature can be downloaded from the TR Register website if required. If you require any equipment for shows/events that your Group is attending, please enquire with the Office as to what is available. We have a full set of both indoor and outdoor exhibition equipment.

GROUP EXPENSES

Finance is a role in itself, and good practice would determine that a TREASURER is an essential role on the local Group Committee, and the Financial role is not incorporated into any other function.

There are two sources of “income” to the local Group, with the first being local organised fundraising activities, for example raffles at Group meetings, and the funds raised this way may be spent in any way agreeable to the local Group membership, this would include charitable donations, sponsorships, events etc.

The second source of income is from the funds within the TR Register, with each Group having a nominal budget of £150 per annum. This amount is reclaimed, using the approved expenses claim form, (see later), accompanied with the receipted expenditure incurred in the running of the Group, and may include room hire, copying and printing costs, transport/fuel costs for club officers attending relevant events. Local Group materials supplied via the Office would also come from this budget, for example banners and flags for use at shows and events. It is always good practice to keep an inventory list of Group equipment to keep a record of Group assets and who has care of them.

Any expense reclaimed from the Group grant needs to be authorised by the Area Director before being incurred.

6. HOW TO WORK THROUGH PARTICIPATION & COORDINATION



Working collectively and together, both at local club, regional, and national levels, is essential for any progress to be made as individuals, Groups, and by the club. This entails supporting as many internal and external activities as possible, through membership involvement, to provide the public shop window for our cars and our members.

The TR Register attempts to showcase themselves around the country/regions at nominated shows and events, eg NEC, Tatton Park, Donington Park, Silverstone Classic, C4RFest etc.... local Group support is essential to ensure the supply of cars and stand resources reaches the standards we set ourselves.

There are literally hundreds of local shows, events and charity functions around the country welcoming our support and participation, each one requiring an individual level of attention and support.

Participation is the “glue” that binds members and Groups together, providing opportunities to use and enjoy their cars, adding value and maximising external exposure in a positive, often creative, way.

It cements social relationships between not only the members but also their own and other families, and provides a sense of worth and belonging to an organisation with values that they are happy to be associated with.

A busy and active events calendar is a sign of a healthy and active Group/Organisation.

7. HOW TO WRITE SOCIAL SCENE REPORTS

Here are a few notes to help inspire and guide our band of Social Scene report writers.

1. Try and keep the report to 300 words maximum. You'll find the ability to check this automatically in Microsoft Word on your computer at *[Review-Wordcount]*.
2. Keep the report snappy, entertaining, and to the point, concentrating on Group events.
3. Use the opportunity to enthuse others to join you, so consider other members reading the report aside from the attendees to the events you are writing about. Ask yourself if, as an outsider, you would find the report interesting and want to find out more about your Group.
4. Try to keep away from continual reporting of the weather and meals taken.
5. Send a single photo to support the article. Try to get one that says something rather than just a line of TRs or a Group of people. Whether it is digital or a print, make sure it is crisp, in focus and with a good colour balance. No backs of heads!
6. When taking photos, please remember to set your camera/phone to maximum pixel size/picture size. We cannot use images that have less than 300 dots per inch and have to shrink pictures with lower resolution until they reach this measurement. This means that however large and high quality your 72 dpi (dots per inch) picture might look on screen, it will not work for print (TR Action). It will be postage stamp size with your report as we will have to shrink it until it has 300 dpi. Similarly, the larger the file size, the more scope for the design team to splash your picture – bigger is better, so 1MB+ is great!
7. Don't be shy - please make sure your report as well as e-mail has your name on it. This is important, it's amazing how much anonymous e-mail we receive.
8. Head your report: *My Group report for TR Action no. ***: My name*
9. Send pictures as JPEG attachment, DO NOT embed them into the e-mail or the Word report text, this 'trashes' the quality of your picture, so that we cannot use it for print.
10. If your report is hand-written please make sure it is readable!
11. We love receiving reports before the deadline – makes our life much easier.
12. Please do not use superscript, especially for numbers/dates. This can be turned off as for hyperlinks above.

Be creative, have fun and above all enjoy writing your reports.

Sounds a lot, but please be assured that if you abide by these rules for writing and getting your copy to the Office then it'll make our job a lot easier. Thank you for your support.

Local Groups should adopt a responsible attitude towards content of their newsletters and any publicly available material and remember that the TR Register could be held responsible for defamatory items published by the Groups. This includes websites and forum activity.

8. HOW TO USE TR REGISTER EMBLEMS, PUBLICITY MATERIAL

The TR Register Office will advise on the most appropriate and possibly the cheapest way of having publicity material produced. The management committee must see designs of emblems to ensure that the design would not be detrimental to the TR Register's image. The design should incorporate the TR Register name.

You may also find it useful to publish a newsletter; the most successful Groups publish a local newsletter regularly. In fact, this is the largest expense for most local groups but possibly one of the best investments. Local Area Directors must receive copies of local newsletters, information sheets, events calendars, etc. for forwarding to the TR Register Archivist, or a copy can be sent directly to the Office.



9. HOW TO MANAGE YOUR GROUP FINANCES

Dealing with Club and local Group finances must be a transparent and consistent process and reported at least annually at the local Group AMM.

Accounting and Expenditure guidance notes are provided below:

LOCAL GROUP ACCOUNTING GUIDANCE NOTES

Introduction

The purpose of these notes is to provide Group Leader or Group Committees with a recommended simple format to enable them to account for their Group's funds, a task which can sometimes seem a bit daunting, but we hope will be reasonably easy if you follow these guidelines. If you are already able to undertake this process without difficulty, then please don't be offended - other people may not be so fortunate! Finally remember that these are guidelines are not 'tablets of stone' (they would cost too much to post!).

Below you will find some specific formats for your accounting records and some notes on their use, but firstly here are some recommendations which will help you to manage your Group's funds.

Date of Claim

Claims can only be accepted for the current financial year which starts on March to February each year. Please try and submit claims promptly as this aids cash flow, workload and accuracy of the quarterly VAT return. If there are any problems regarding the timescale of any claims please do contact the Finance Director or the Office - the club does not expect anyone to be out of pocket as a result of work done on its behalf.

Group Leader or Group Committees/ Other Organising Members

Groups may claim £150 per annum towards specific items of expenditure. If a claim is in excess of this amount, please seek the agreement of the Chair/ Financial Director/ Management Team in advance.

Obviously, these guidelines are not prescriptive and are merely intended to clarify some areas of misunderstanding - if you are in any doubt please feel free to contact the Office or the TR Register Financial Director for clarification.

General Recommendations

Before you undertake the maintenance of the Group's accounts yourself, search your Group to see if you have a willing accountant - this will definitely make life a lot easier.

Assuming you can't find anybody suitable then the first stage is to open a bank account in the Group name. It is advisable to get another person from the Group to be a co-signatory (perhaps for cheques over a certain limit - say £50) - this will help to demonstrate your 'accountability' to your Group members. Some banks offer Group account Internet bank services with dual authorisation, it is worth checking if this service is available as cheques are becoming less acceptable and used less often.

As mentioned later in these guidelines the bank account will form the core of your accounting system. It is therefore advisable to ensure all financial transactions flow through it, so as to help you keep track of events - thus you should:

- Ensure that all cheques received are in the name of the Group Bank account.
- Always pay income (cash or cheques) into the bank promptly.
- If you collect income or pay cheques for more than one thing then keep a note of their 'breakdown' .
- Try not to pay bills out of any cash collected - if this is impossible then try to make sure you keep a note of what you have done - but remember, this will inevitably make the accounting process more complex at the end of the year, as Group accounts must reflect all income and expenditure whether by cash or bank transaction.
- Make entries into your cash book promptly whilst transactions are fresh in your mind.
- Keep all receipts for expenditure (and income if possible).
- If you are organising an event - make sure you keep a record of who has paid what.
- It is good practice to keep an inventory of Group assets (banners, gazebo etc) and who has care of them.

Decide on a suitable accounting period (probably 1st January to 31st December is easiest). Order regular bank statements (at least quarterly) and make sure you get a statement that gives you the closing balance as at the end of your chosen period (if necessary, order one from the bank specifically).

Procedure for claiming expenses from TR Register

The claim should be made on an official expense form and submitted to the TR Register Office for processing and payment.

A copy of the Group's accounts should be submitted for the club's files.

Remember if you are in any doubt as to how to deal with financial matters then advice may be sought from your Area Director who will either answer your query or direct you to the appropriate Management Team member for help.

TR REGISTER - GROUP MODEL CASH BOOKS

Introduction

The bank account is the foundation of your accounting system. As a result, it is important that you maintain a good record of the transactions flowing through it.

Notes

It is suggested that you obtain some 16 column (A3) analysis paper. Use separate sheets for expenditure and income and always ensure that you start new sheets at the beginning of each year. The sheets can be conveniently kept on a lever arch file along with your Group bank statements. Alternatively you may use a spreadsheet, but hard copies should be retained as a permanent record of transactions

Expenditure - the model cash book records the date of any cheques drawn, the cheque No., the payee and the amount of the cheque, also the same for Internet transactions. It should also record 'invoice No.' - it is suggested that you try to keep a document supporting each transaction on the lever-arch file and give each document a number for ease of reference.

Next to the 'amount' columns create a number of columns to analyse the Group's expenditure - the descriptions are not exhaustive and can be increased to suit the Group's needs. Each line of analysis should agree in total to the amount of the cheque - e.g., cheque No. 000101 to 'Group Leader or Group Committee' sub-divided into 'Postage/telephone' and 'Miscellaneous'.

Income - this is constructed in a similar way to the expenditure section with the exception of the 'invoice No.' column - this is to recognise that it is not always so easy to obtain documents to support income (although it is advisable to do so if possible).

At the end of each period/year you will need to rule-off each section of income and expenditure and total each column. The sum of the analysis columns should equal the total of the amount paid or received column.

Having ruled-off and agreed the cash book, it should now be possible to use the analysis to transfer totals to the income and expenditure account shown in the next section. If you compare the model cash book and the account, you should be able to see how the figures have been derived.

There is an example on the next page:

LOCAL TR GROUP

INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 DECEMBER 2019

INCOME GENERAL	£	£
Grant - TR Register	125.00	
Newsletter Subs.	30.00	
Xmas Party - Tickets sold	550.00	
Raffles	100.00	
Misc.	<u>5.00</u>	
		810.00
EXPENDITURE	£	£
Room Hire	120.00	
Raffle Prizes	50.00	
Postage & Telephone	10.00	
Christmas Party Meal	500.00	
Misc.	<u>10.00</u>	
		-690.00
EXCESS OF INCOME OVER EXPENDITURE		<u>120.00</u>
RECONCILIATION TO BANK BALANCE		
OPENING BALANCE PER BANK STATEMENT (note 1)		100.00
ADD: income recorded in last year's cash book but not processed until y/e 31/12/19 (note 2)		50.00
LESS: cheques written in previous year but not processed by bank until y/e 31/12/19 (note 3)		<u>25.00</u>
		125.00
		<u>120.00</u>
CLOSING BALANCE OF GROUP FUNDS		245.00
ADD: cheques written in current year but not appearing on bank statement until 2020 (note 4)		5.00
LESS: income received in current year but not processed by bank until 2020 (note 5)		<u>62.50</u>
BALANCE PER BANK STATEMENT - 31/12/19 (note 6)		<u>187.50</u>

NOTES TO MODEL ACCOUNTS

Introduction

The income and expenditure account to summarise the activities of the Group for the year, by simply subtracting payments from receipts. The bank balance forms the 'core' of this simplified system and it is this to which we need to agree at the end of the year, so as to ensure the accounts prepared are accurate - thus a statement showing the net movements in cash over the year is prepared:

Notes

OPENING BALANCE (note 1) - This will be the commencing balance on your first bank statement of the year.

LAST YEAR'S INCOME (note 2) - in order that this example be as realistic as possible it has been assumed that income of £50 collected just prior to the end of the last year (say on the 31 December) was not able to be banked until the current year (say on the 2 January). Obviously, this income will have been accounted for in LAST YEAR'S accounts, so we need to make an adjustment to help us agree to this year's balance.

CHEQUES & TRANSACTIONS FROM PREVIOUS YEAR (note 3) - again for realism it has been imagined that a cheque for £25.00 was written just prior to the end of LAST year which was subsequently processed in THIS year. A suitable adjustment is therefore required.

UNPROCESSED CHEQUES FROM *THIS* YEAR (note 4)- similarly it is probably that a cheque late in this year might not be processed by the bank until *NEXT* year - in this instance we have assumed that the cheque for £5.00 to 'A Member' (see model cash book - expenditure) has not yet been banked by him - again an adjustment will be required to reflect this.

UNPROCESSED *CREDITS* FROM THIS YEAR (note 5) – lastly, we have imagined that income of £62.50 received from the Register (see model cash book - income) in 2000 was not banked until 2001.

CLOSING BALANCE (note 6) - This is simply the balance on the last day of our year - 31 December 2019 - obtained from the bank statements. If your reconciliation agrees to this balance, then your accounts are correct.

A simple method of obtaining the adjustments mentioned above is to compare your cash book and bank statements for the year. If you 'tick-off' one against the other, you will probably notice two things:

There are cheques and income on the statement which relate to the previous year - these will form the basis of adjustments 2 and 3 above.

There are cheques and income recorded in the cash book which do not appear on the bank statements - these will form the basis of adjustments 4 and 5 above.

If, during the 'ticking-off' process you notice any other unusual items not recorded in your cash book (e.g., bank charges) THEN YOU MUST INCLUDE THESE IN YOUR INCOME AND EXPENDITURE ACCOUNT - otherwise you will not balance and your accounts will be inaccurate.

EXPENSES CLAIM



Name: _____

Address: _____

_____ Post Code _____

TR Register
1B Hawksworth
Southmead Industrial Park
Didcot, Oxon.
OX11 7HR
Tel: 01235-818866
Fax: 01235-818867
E-mail: office@tr-register.co.uk

Membership number: _____

Date of claim: _____

OFFICE USE ONLY

Claim details	Amount	VAT	Ex VAT	N. code	Tax code
TOTAL					

Please make the cheque payable to: _____

I certify that I have incurred the above expenditure on behalf of the TR Register.

Signature: _____ Date: _____

Notes

1. Invoices/receipts must be attached.
2. Please give specific details of claim e.g. the event the claim relates to.
3. Please submit claim to the office promptly. Claims cannot be backdated outside the current financial year.
4. Mileage claim 40p per mile

ACCOUNTING SPREADSHEET EXAMPLE

	A	B	C	D	E	F	G	H	I	J	K
1	TR REGISTER MODEL CASH BOOK.										
2											
3	EXPENDITURE										
4								Analysis			
5	Date	Chq No	Inv No	Paid to:-	Amount		Room	Raffle	Post/tel	Xmas part	Misc
6											
7	1 Jan	000100		1 Royal Oak	£ 120.00		£ 120.00				
8											
9	5 June	000101		2 Group leader	£ 15.00				£ 10.00		£ 5.00
10											
11	10 Nov	000102		3 Halfords	£ 50.00			£ 50.00			
12											
13	16 Dec	000103		4 A restaurant	£ 500.00					£ 500.00	
14											
15	20 Dec	000104		5 A member	£ 5.00						£ 5.00
16											
17	Total expenditure for year				£ 690.00		£ 120.00	£ 50.00	£ 10.00	£ 500.00	£ 10.00
18											
19											
20											
21	page 2										
22											
23	INCOME										
24								Analysis			
25	Date			Description	Amount		Grant	Raffle	Mag subs	Xmas part	Misc
26											
27	1 April			TR Register grant	£ 62.50		£ 62.50				
28											
29	5 June			Collection June	£ 35.00				£ 30.00		£ 5.00
30											
31	16 Dec			Christmas raffle	£ 100.00			£ 100.00			
32											
33	16 Dec			Sale of party tickets	£ 550.00					£ 550.00	
34											
35	20 Dec			TR Register grant	£ 62.50		£ 62.50				
36											
37	Total income for year				£ 810.00		£ 125.00	£ 100.00	£ 30.00	£ 550.00	£ 5.00
38											

10. HOW TO MANAGE COMPETITIVE EVENTS AND THE MOTORSPORT UK

The Road Traffic Act, England: The Motor Vehicle (Competitions and Trials) (Amendment) (England) Regulations 2010 appoint the Royal Automobile Society Motor Sports Association (MOTORSPORT UK) as the authorising body for all on road competitive motor sport events involving more than 12 cars in England. The Royal Scottish Automobile Club carries similar responsibilities in Scotland

Clubs that are members of the MOTORSPORT UK (as is the TR Register) are able to organise motor sport events under the MOTORSPORT UK 'umbrella', but in return must abide by the MOTORSPORT UK rules when organising certain types of event.

The MOTORSPORT UK defines an 'event' as: 'an activity that is organised by a club for its members and advertised through whatever medium that club uses to publicise its activities' (this would include TR Action or the website). Alternatively, where a Group of persons, who may share membership of a club, arrange between themselves to meet up and do something together, then such informal activities may not be construed as a club event and do not require approval from the MOTORSPORT UK'.

Motor Sport events such as rallies, hillclimbs, sprints, trials, autotests, and autosolos should be organised in accordance with MOTORSPORT UK regulations. Advice on this can be obtained via the TR Register Office or the Competition Secretary.

Events Exempt from the Regulations

The MOTORSPORT UK position is that the following events are not sporting events and may be organised under the legal and insurance umbrella of a Certificate of Exemption: Touring Assembly; Road Safety Event; Procession for Historic Purpose; Procession for Charitable Purpose; Veteran Rally or Run; Gymkhana; Treasure Hunt; and Concours d'Elegance.

A Certificate of Exemption is a pre-paid type of permit issued by the MOTORSPORT UK to exempt the event from the regulations contained within the MOTORSPORT UK Competitors' and Officials' Yearbook.

TR Register advice to Group Leader or Group Committees is that for any road based event where there is a mandatory route to be followed, or where there is any element of time control or other competition, an MOTORSPORT UK permit or exemption certificate should be obtained. Generally this includes all treasure hunts (which have a competitive element). The reason for this is that if any part of a competitive event takes place on the public highway it is subject to the provisions of the Motor Vehicle (Competitions and Trials) Regulations. Obtaining a Certificate of Exemption goes some way to protect the event organiser against the allegation that they have, improperly or illegally, held a competitive event on the public highway.

INDEMNIFICATION AND INSURANCE

The TR Register has an insurance policy which indemnifies the TR Register and its local Groups (as defined in this document) in respect of claims arising out of their activities either as the TR Register or as a local Group. There are a number of simple points you should bear in mind. Non-members cannot organise events on behalf of the TR Register nor can they be local Group committee members. If they do so they bear full responsibility in the event of any claims arising. The TR Register (and our insurers) will not accept responsibility for their actions. Paid up family members involved in events are covered by the insurance. If you have any doubt about insurance as it affects your activities as a local Group Leader or Group Committee *always* discuss the matter with your local Area Director.

Liability arising out of the use of motor vehicles is *not* covered by the Register policy. Members are themselves responsible for insuring their own cars or, if an element of competition is involved then a MOTORSPORT UK waiver or permit must be obtained to provide indemnity.

Motor racing and motoring competition are potentially hazardous to drivers, to passengers, to spectators and to passers-by, and the Road Traffic Act imposes many restrictions on events. All such events organised by the local Group in the name of the TR Register must comply with relevant law and Motor Sport Association regulations. Local Group Leader or Group Committees must apply through the TR Register for MOTORSPORT UK permits to ensure compliance before advertising any competitive event. Any non-member involved in taking part or organising an event which requires an MOTORSPORT UK permit is not covered by MOTORSPORT UK insurance. Neither the TR Register nor the MOTORSPORT UK will take any responsibility for the actions of non-members.

It is the responsibility of any party suffering loss or injury to submit a claim under the common law for recovery of their losses or compensation for their injuries. Such claims would normally be passed to the member or members of the TR Register alleged to be responsible. Such member or members may then ask the TR Register's insurers to handle the claim on their behalf. Of course, such claimants can direct their claim directly to the TR Register as a legal entity on the grounds that the individual members were acting in their capacity as members of the TR Register.

11. HOW TO IMPLEMENT THE TR REGISTER GDPR POLICY

1) The TR Register manages its members personal data under its GDPR policy which is reviewed periodically and available on the website.

<https://www.tr-register.co.uk/gdpr-policy>

2) The objective of the GDPR policy is to provide a framework to protect its members' personal data whilst still allowing the club to operate for the benefit of its members.

3) All local groups should have a local group GDPR policy to provide a framework on how to protect the TR Register members' personal data within the local group. A simple template is available as a download within the above policy, from the Office or the GDPR controller.

4) However, as some guidance on how to implement this policy then the following are some simple steps, we can all take to protect our members' personal data:

a) only store members' personal data in a secure environment and when you have a need to do so for club purposes.

b) ensure you know where all member's personal data is held – it may need to be deleted at the request of the member.

c) keep distribution lists up to date and they should only contain relevant people.

d) when sending an email to a distribution list then use the bcc: address column

e) if you receive a request from a member to be removed from a distribution list, do so immediately and confirm back to that member that it has been actioned.

f) if you receive a request from a member to be removed from your database i.e. to be forgotten, then do so immediately and confirm this to them. In addition, ask the member if they also wish their personal data to be removed from all club databases. If this is the case, then please advise the TR Register Office ASAP.

g) if you inadvertently expose some members' personal data then please advise the TR Register Office asap. The primary purpose of this is to learn from each other and to ensure that we put processes into place to avoid any repetition.

If you have any suggestions to improve this guidance or helping the club protect its members' personal data, then please contact Mick Forey, the TR Register GDPR Data Controller at international@tr-register.co.uk

12. HOW TO PROMOTE YOUR GROUP VIA THE TR REGISTER WEBSITE

There are key points of a good webpage information. It is important to think 'What the visiting members are looking for?'

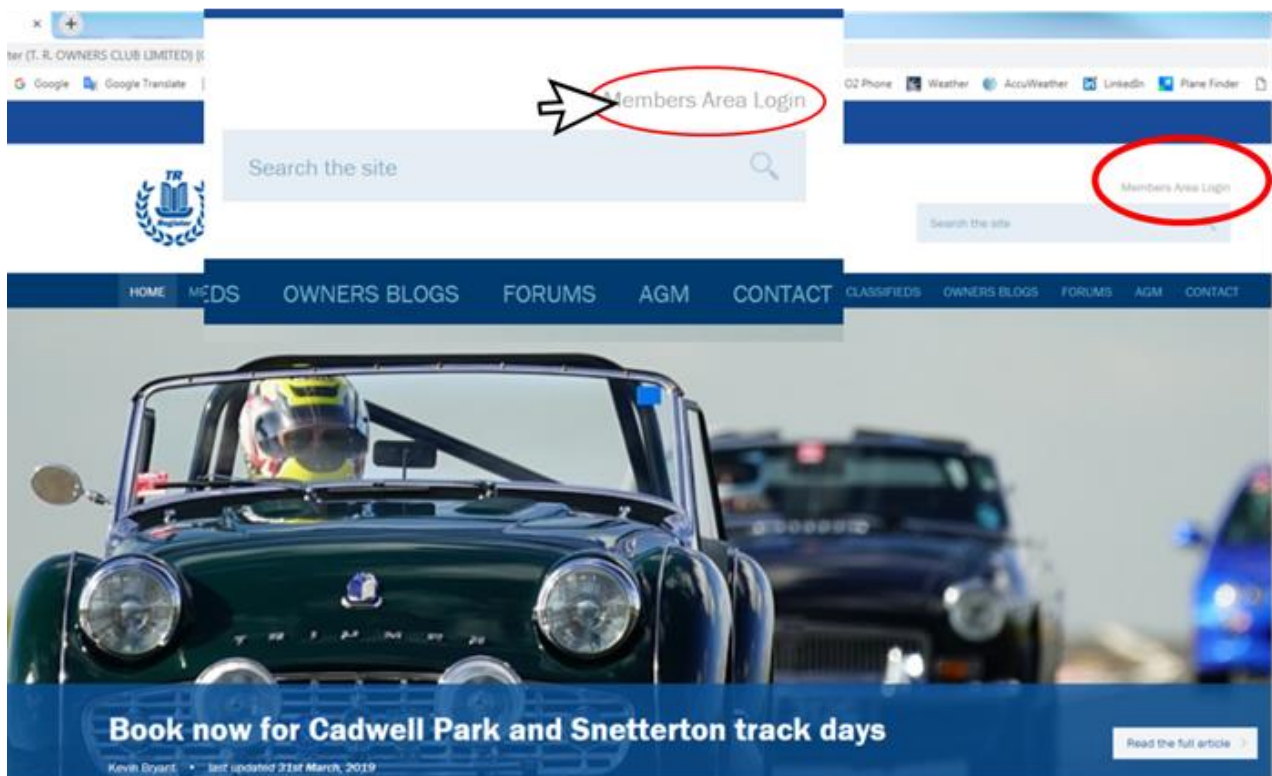


These are key points of a good webpage information. It is **important** to think 'What the visiting members are looking for?'

- 🏰 **Guide the eye.**
 - Use colours, titles and bold if needed to guide their eye to the parts that they might be important to them. 👁️👁️
- 🏰 **Spacing.**
 - Don't crowd your webpage, keep it clean and easy to read, use spacing. Use basic fonts. 🪐
- 🏰 **Alignment.**
 - Keep things lined up. It shows professionalism and it is easier to read. 📏
- 🏰 **Navigation.**
 - It is very frustrating if you cannot navigate the webpage, always think, is the page easy to use and easy to see the next action needed to go to the next page or link? 📍📍
- 🏰 **Usability.**
 - Provide the information that your members are looking for, Make it easy to contact you 🗝️

BEST ADVICE IS TO KEEP IT SIMPLE!

Where to Start, on your web browser, go to: www.tr-register.co.uk then to Members Area Login.



You will come to this page, scroll down and enter your username and password click the Login button.

A screenshot of the TR Register Members Area Login page. The page has a blue header with the TR Register logo and navigation links. A callout box with a blue border and a pointer highlights the login section. Inside the callout, the text 'Login here:' is followed by 'Email address' and a text input field containing 'Group-Leader@BestTRGroup.com'. Below that is 'Password' and a password input field. A 'Login >' button is highlighted with a mouse cursor. To the right of the button is a link 'Forgotten your password?'. Outside the callout, the page shows a 'Not a member?' section with a 'Membership from £47 p/year' offer and a list of benefits under 'What you can access:' and 'What you can do:'.

**Members Area
Log in Screen**

Your member area screen with editing for TR Register webpages

N.B.: only those members with editing rights will see all these tabs

The screenshot shows the TR Register website's Members Area. At the top, there's a header with the TR Register logo, a tagline 'For all TR enthusiasts past, present & future', and a user greeting 'Hello Phil Horsley' with links to 'Members Area' and 'Logout'. Below this is a search bar. A main navigation bar contains links like HOME, MEMBERS AREA, JOIN, SHOP, NEWS, EVENTS, LOCAL GROUPS, MOTORSPORT, INSURANCE, CLASSIFIEDS, OWNERS BLOGS, FORUMS, AGM, and CONTACT. A secondary bar under MEMBERS AREA includes MEMBERS FEED, RENEW / UPDATE YOUR DETAILS, MY BLOG, MY CARS, MY EVENTS, MY CLASSIFIEDS, and EDIT YOUR GROUP. The main content area is titled 'Members Area' and welcomes users, listing resources like TR Action magazine and membership management. A 'What you can access:' section lists links to TR Action Magazine online, Technical Documents, Exclusive video seminars, Touring and Travel advice, and Discounts and Vouchers for members discounts. A 'Latest News' sidebar on the right features articles such as 'Tips for driving your TR in Europe after Brexit', 'Book now for Cadwell Park and Snetterton track days', 'TR Register bids farewell to a club treasure, Barry Goswell', and 'TR Register wins 'Best Club Display' at London Classic Car Show'.

You are now at the web editors page for your Group where you can edit various pages of your website. The web-editor menus bar (after clicking 'Edit Your Group') is similar to the normal members menus but has some extra functions to enable webpage editing. Try to have some detail in every section for a complete viewer experience or if you need an extra section for instance 'Meet the Group Committee', then please ask the Office.

This screenshot shows the 'EDIT YOUR GROUP' interface. The top navigation bar is identical to the previous page. Below it, a secondary bar highlights 'EDIT YOUR GROUP' in blue. Underneath, a row of tabs includes GROUP INFORMATION, EDIT SOCIAL, EDIT PAGES, GALLERY, and MY SOCIAL REPORTS. Five callout bubbles point to these tabs with the following instructions: 'Insert your Facebook, Twitter account details or add others' (pointing to EDIT SOCIAL), 'Edit Group front page, cars, Team etc.' (pointing to EDIT PAGES), 'Add Group Gallery Pictures' (pointing to GALLERY), 'Add Group Social Report' (pointing to MY SOCIAL REPORTS), and 'Add Group Event' (pointing to a tab that is partially obscured but likely related to the event management section).

As an exercise, here is how to add your local Group event to the webpage. Firstly click on 'EDIT YOUR GROUP' then 'Add an Event'.

The screenshot shows the 'My Events' page. The top navigation bar is the same. The secondary bar highlights 'EDIT YOUR GROUP'. Below it, the 'MY EVENTS' tab is selected. A callout bubble points to the 'Add new event' link with the instruction 'Click on an event title to edit or click 'add a new event' to add a new event'. The main content area displays a list of events, each with a title, a status (e.g., 'Approved'), and a 'Delete' link. The events listed are: 'Kennet Valley Xmas & New Year Bash 2019/20', 'Kennet Valley TR Group July Mid-Monthly - visit to Thames Traditional Boat Festival', 'Kennet Valley - Pangbourne Classic Car Show 2019', 'TR Register to attend Basingstoke Festival of Transport', and 'Kennet Valley TR Group - Drive it Day Run & Visit to Holycombe Steam Fair'.

Here is what you will see and what the functions are. You can input your narrative in the content box, you can then edit, change text, embolden, underline, add pictures and videos.

Add Event

Title:

Date:

Event Type:

Location:

Location Group:

Content:

Image:

Event Details:

Call this event a public event or private

Callout boxes:

- Add title, try and make it attention grabbing and descriptive
- Dates can be one or multi-days i.e. a whole weekend
- Probably the most important wording, write something 'catchy' to entice viewers to read the post.
- Type and local Group can be chosen from a drop down or for the latter you can write your own title
- The narrative about the event should be kept as minimal as possible with good spacing, if a lot of narrative, paragraph frequently and add some graphics or photos to make easy reading
- Upload the event image or graphic here, pictures at least 1Mb for quality

Enter the contact details for the event so your members know where they can get further details and information.

Then at the bottom, after putting in your contact details then it is important to tick these three boxes. Doing this will request your event to be posted on TR Register Facebook & Twitter and most importantly notify your Group member there is a post from your Group on the website.

You can add an event booking box with open or limited capacity for your members to sign up to.

Publicise your event

☐ Post to Twitter ☐ Post to Facebook ☐ Auto email group members?

Collect event registrations

☐ Require sign-up?

Select this option to enable members to sign up to your event

Event Capacity

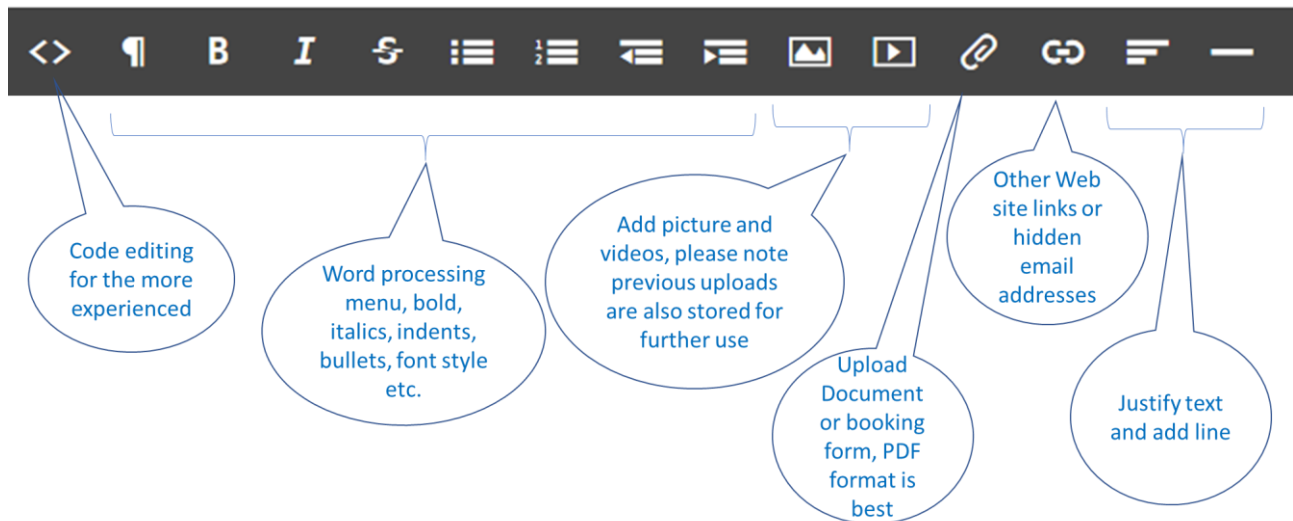
0

Leave as 0 to have no limit on attendees

Choose who sees it

☐ Display to group only?

You can then save and submit for approval or save as draft for future editing. When you are typing in your event detail narrative, you have various editing tools available to you, you can see a menu at the top of the editor and here are the functions.



Note that you can add photos and videos to your event etc., to add a video you will first need to upload to YouTube or Vimeo then copy the link code into the box when instructed, here's what it looks like.

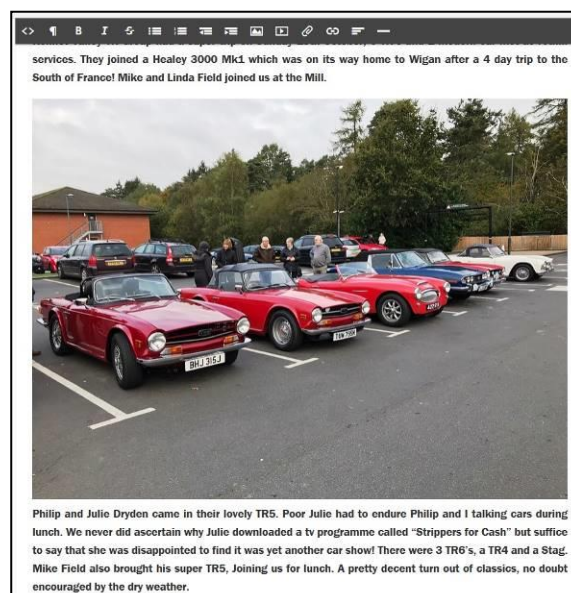
Insert Video

Video Embed Code or Youtube/Vimeo Link

Cancel

Insert

Here is an example of an event narrative with photo.



If you are adding web links to your events or social scenes for instance a location of the venue website, it's a good idea to add the link within the typed name, you can do this as follows.

Content

Click this icon →

www.tr-register.co.uk

TR Register

group-leader@kvgtts.co.uk

Group Leader

Tidying up 'links'

Here's a tip to tidy up your narrative and protect email addresses from spam robots

Instead of this

Look like this

Insert link

URL

http://www.tr-register.co.uk

You can do the same for email addresses

Text

TR Register

when clicked tick this box so the link opens in a new tab in the browser

☒ Open link in new tab

Cancel Insert

Media Manager

Only landscape images please

Once you have completed your inputs press the 'Save & Submit Event' button and the event will be stored for approval by the TR Register Office, once approved it will appear on your Group webpages.

There are many other features and tools within the web editor, as with anything, the more you use it the more proficient you will become, if you're stuck, always give the Office a call and they will put you in contact with someone who can assist you.

End of document (issued 04-03-2020) Author: Phil Horsley