

A Paper to Introduce Training for Management Group Volunteers

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Union Notes:

- Management Group (MG) volunteers, also known as MG officers, include MG Treasurers, Presidents and/or Clubs & Socs Chairs/Officers.
- MG officers are tasked with being the last person of the approval chain for claims (under £250), imprests (under £1000), purchase orders (under £1000), credit card requests, international payments, internal charges, CSP constitution changes, event budgets, credit notes, sales invoices and transaction corrections.
- If MG officers are the last person within the approval chain and the administrative item to be approved is financial, the Finance team will receive this and may have to alter it themselves if done incorrectly.
 - This causes redundancy in having MG officers approve items, potentially both for the Finance team if Finance have to check the item again as what the MG officer would have done and for CSPs and their committee members if MG officers incorrectly reject items.
- If MG officers are not the last person within the approval chain, then the DPFS/DPCS/Head of Activities has to approve the item.
 - This again causes redundancy in having MG officers approve items if they are poorly trained as the Union staff member that has to approve the item last will have to perform the same check on items that may have easy mistakes within them.
- MG officers are generally asked by their CSPs on assistance with these financial and administrative processes.
- **There is no dedicated training for MG officers to identify whether these items should be approved or not.**
- The eActivities training section provides details on these administrative items but doesn't detail how an MG officer should approach them.

Union Believes:

- Redundancy is caused in having MG officers approve administrative items on eActivities if they are poorly trained, as the Union staff member that will have to check or approve the (financial) item will have to perform the same check on items that may have simple mistakes that could be easily spotted within them.
 - This increases the eActivities workload of the DPFS/DPCS/Head of Activities/Finance to work on other things.
- MG officers have to rely on the knowledge given by members of previous committees, their own prior knowledge of financial responsibility roles or just simply learn as they go.
 - This means that MG officers will have varied amounts of knowledge about approving items from their CSPs.

- The learning curve for the lay student to enter these roles is steep, meaning that more time is spent having to go through the basics rather than having focusing on the other aspects of the role such as budget
- Utilising the current eActivities training section to train new MG officers in approving is insufficient and may require MG officers having to seek assistance from the DPFS or DPCS for every new instance, which takes away from their time.
 - Having this information provided by in reflection of an event post-mortem done previously or by another MG does help avoid this, but it does require every MG going through this same process of asking Union staff first if a common knowledge base isn't regularly available.

Union Resolves:

- Provide dedicated MG officer training session(s) that will go over:
 - The responsibilities of an MG officer
 - All financial processes that are available to CSPs (e.g purchase orders, claims, imprests etc.) and when they should be used
 - How to approve each of these financial processes
 - General eActivities advice to channel down to CSPs
 - Managing event budgets and CSP constitution changes
 - Annual Budgeting
- A tailored knowledge base ('wiki') for MG officers that is moderated by the DPFS / DPCS / Head of Activities, along with select members.
 - This wiki is accessible publicly but only current MG officers can add and edit information and initiate a change in the wiki.
 - Select members can approve these changes for it to be published.
 - This system can be managed on GitHub or creating a completely new system for change tracking.