# SG4 Development and Documentation

# Q1 2019/20 Plan

## Actions before Christmas

Background: Some work has already commenced to develop website information for our external stakeholders (eg Head of School) – publicly available, and also to develop a **Handbook** for FMs/Directors of Finance (not available to general public). Draft Fee Income info for public availability can be reviewed [here](http://www.ucd.ie/bursar/bursarsoffice/fpma/managementaccountingtopics/feeincomeftesandfeerelatedexpenditure/); draft of the handbook is available [here](http://www.ucd.ie/bursar/bursarsoffice/fpma/fms/).

**Action 1.** Enhance the Fee Income information so that it is of use to Heads, for use with the Nov Census. Provide overview, images, make it more easily digested and appealing, Worked Examples etc.

**Action 2**. Provide a Top10 resource in the Handbook with links, descriptions etc. for the Top 10 reports that FMs are likely to use.

**Action 3**. Get all FMs to identify 1 or 2 items that already exist and should be included within the Handbook. Typically these are emails or docs previously distributed but are difficult to put your hand on. The Handbook should be the formal place of record for such items from now on. Aim is to be able to collate these and incorporate them into the Handbook relatively quickly.

**Action 4**. Encourage greater uptake of development opportunities [More of a push on courses available, better use of ICA Training ticket, incorporate feedback on development activities to regular fortnightly meetings; put links to development material on Handbook]

**Action 5**. Consult on and agree the requirements for an Excel training course for the FMs to cover material that is actually useful for our role; schedule training with external provider. TBC whether to hold before or after Christmas.

**Action 6**. Get every FM to nominate a couple of Excel resources [in general or specific tips] that are good quality and publish these on the web so that they can be easily found by FMs. [May merge this with the more general Excel initiative in the wider Finance Office].

**Action 7**. Review and decide on a permanent structure for the FM Handbook [perhaps mirroring sub-groups]. Identify what resources are to be created on the Handbook (e.g. determine the areas where procedures are to be developed, with the development of the procedure to follow on a timescale to be agreed).

**Action 8**. Look at and document what we do now, also gett input from stakeholders on what they are looking for, with a view to setting out and getting agreement of where we are going. [New UCD Strategy will be relevant for this]. This would then allow an assessment of what development is appropriate to support us. Unlikely to be concluded before Christmas, but intention is to complete the ‘what do we do now’ portion before Christmas.

## Scope and Objectives

[Not much time for discussion of this, so EON draft is provided]

Document our policies and procedures so that

* the typical **basic,** **general** information needs of a Head of School can be met by the website, enabling more time for higher-value interactions [recognising that a lot of our value is founded on the personal relationships with Heads and that some Heads will prefer to phone/drop in to check something than to look it up];
* Most of the routine, structured work that we do is documented so that e.g. a temporary accountant filling in for an FM on sick leave is in a position to perform those routine, structured tasks with an appropriate (low) level of support;
* We move together towards performing the same routine, structured work in the same way, using the same tools. This facilitates efficiency, provision of cover, consistency in service delivery etc. Documenting such procedures provides some level of opportunity to re-design them and may provide requests to the Technology sub-group to provide or enhance specific tools. NB this relates to routine, structured work and does not suggest that each college or school is identical, or that each Head or Principal has the same style.

Document our current role and our expected future role, incorporating input from stakeholders. When there is clarity about where we are going, we can then draw up development plans to support us.

## How the sub-group will function

Fortnightly meetings in the week between meetings of the FM group.