Branch Budget and Event Management Process

NZISM | New Zealand Institute of Safety Management

Branches determine annual activities, produce budget forecast and submit to Senior Leadership Team (SLT)

Branch Manager sets date, title, ticket cost, location and sends to CPD Manager

CPD Manager loads event into calendar and ticketing system, and informs Comms Manager for next newsletter

Branch Manager organises event

Cash sales at event

SLT reviews annual branch budgets and provides event approval decision

Approved: Finance & Membership Manager holds annual forecast

Yes

No

Not approved: CEO/SLT informs Branch Manager

No

Yes

Send all event invoices for payment to Finance & Membership Manager

Branch Manager keeps a log of who attended, members/ non-members, totals paid and sends to Finance & Membership Manager

Finance & Membership Manager reports on event attendance and financials in following monthly report

Branch Manager deposits funds to National Account and submits attendance report to Finance & Membership Manager

End