

# DEVELOPMENT STUDIES ASSOCIATION

## STUDY GROUP GUIDELINES

Effective from 8 February 2017

1. Objectives – The DSA Study Groups (SGs) are intended to encourage the development of new ideas, and to facilitate interaction and exchange of ideas within the development studies community. In general they are oriented towards exploratory discussion, research and dissemination. These Guidelines are for the widest possible circulation in order to enable the effective operation of the SGs.
2. Guiding Principles – It is DSA policy to allow SGs freedom within these Guidelines and to ensure that SGs meet DSA members' needs, that financial management is consistent, that DSA funds are equally available to all SGs, and that funds are spent in a 'reasonable' manner. Although exceptions will be permitted, in the normal course of events these Guidelines will apply. Those responsible for the management of the SGs, including the finances, are the SG Convenors, the SGs Co-ordinator/s, the DSA Treasurer and the DSA Administrator. In case of appeal or dispute the DSA Council will adjudicate.
3. Membership of Study Groups – In line with the objectives set out in paragraph 1 participants in SG activities should be DSA members. It is absolutely necessary that the named SG Convenor is an individual DSA member or that their institution is an institutional member of the DSA. Otherwise details of the SG cannot appear on the website. Normally, any SG participants who are not members of the DSA may attend one meeting before being asked to join the DSA. Those who are not members of the DSA are not permitted to claim reimbursement of any expenses, except for specially invited speakers with prior agreement of the SG Co-ordinator/s and the DSA Treasurer. Where an SG charges a fee to participants in its activities, non-DSA members will normally be charged a higher fee.
4. SG Activities:
  - a. Meetings at the DSA Annual Conference – All SGs should arrange a meeting during the DSA annual conference. If a substantive meeting is not feasible a planning meeting may be held. Where it is not possible to arrange an SG meeting during a one-day DSA annual conference (due to limitations of time) consultation should take place concerning future plans or a virtual meeting may be held. DSA SG funds may not be used to cover any costs associated with meetings at the DSA Annual Conference.
  - b. SG Workshops/Meetings outside Conference – All SGs should aim to hold **at least one workshop** a year outside of the conference. An announcement of the event and papers produced should be placed on the DSA website and information should be publicised in the monthly DSA e-newsletter as far in advance as possible. Information and publicity material should observe a distinction between DSA SG activities and the activities of institutions in which Convenors are based.
  - c. SG panels at the DSA Conference – all SGs are encouraged to organise panels at the DSA conference. The Convenors should disseminate the call for panel proposals announced for the conference to the members and submit a proposal for thematic panel session/s at the conference.
  - d. SGs are encouraged to make use of an SG email list set up and run on the DSA domain.
  - e. As one of the most important public faces for the DSA, SGs should use the existing platforms (DSA website, DSA newsletter, etc.) to regularly seed debates and showcase excellent development research.
5. Annual Funds – Each SG is allocated a minimum of £500 per annum in the DSA Budget. The funding may go higher in support of specific events following prior negotiation between the SG Convenor(s) and the SG Coordinators/DSA Administrator. The SG funds are intended to facilitate workshops of the SG, and the procedures outlined in paragraph 7 and summarised at the end of these Guidelines have to be

followed without exception. All SG expenditure plans and proposals need to be approved by the SG Coordinators at least one month before events are due to take place, and will be recorded by the SG Coordinators and by the DSA Administrator. Wherever possible, SGs should seek additional funding for events from other sources.

6. Allowable Expenses for SG Meetings Outside Conference – The DSA allocates funds to the SGs to cover specific types of expenditure. Expenditure which will be supported by the DSA includes the following:
- Reimbursement of reasonable travel expenses for DSA members attending Study Group meetings and presenting papers (for example, standard class rail fares with discounts). DSA members who are employed (e.g. university lecturers) should claim their travel expenses from their employer wherever possible.
  - First priority for the reimbursement of travel expenses will be given to research students who are DSA members.
  - Outside speakers who are not members of the DSA, but who have been invited to present papers by the SG Convenor(s), may have their travel expenses reimbursed by special prior agreement between the Convenor(s) and both the SG Coordinators and DSA Treasurer.
  - Reasonable expenditure on room hire, modest food and other refreshments (such as tea, coffee, fruit juice and water) and postage.

All members' travel expenses which are the subject of a claim for reimbursement should be agreed in advance with the individual SG Convenor(s) in order to ensure that:

- The individual sum involved is reasonable,
- The amount claimed can be covered by the budget for the SG activity, and
- The DSA does not over-commit itself financially.

In the absence of prior agreement, funds may not be paid. If there are any doubts over the application of these financial procedures the SG Coordinators should be consulted.

7. Financial Procedures – SG activities using DSA funds should be approved in advance (at the planning stage) by the SG Coordinators on the basis of a completed budget protocol form (downloadable from the DSA website) submitted by the Convenor(s). Requests for reimbursement by DSA members (the claim form can be downloaded from the DSA website) must be accompanied by receipts, must be countersigned by the Convenor(s), and should be submitted to the DSA Administrator. Convenors should make certain that participants in SG meetings are DSA members before claims for reimbursement are countersigned.
8. Reporting – SG Convenors are required to complete a **short annual report** together with an outline of future SG plans. These should be submitted to the SG Coordinators before August every year. A summary of these reports and plans will be prepared by the SG Coordinators for inclusion in the Annual Report to the DSA AGM and in the DSA report to the Charity Commissioners. Standard forms for the report and for the future plans are provided as Excel documents on the DSA website.
9. Convenors' Responsibility – It is the Convenors' responsibility to demonstrate that groups justify continued support by the DSA. The approved list of SGs will be reviewed annually.
10. Establishing New Groups – Those seeking to establish new groups should approach the SG Coordinators with a short written proposal including a rationale for the new group. New SGs may be established on a temporary basis in order to deal with a specific issue, or on a long-term basis related to a specific and relevant subject area. Themes that are complementary or have some similarities will be encouraged to combine into one SG.
11. DSA website and mailing list – Convenors should provide a brief description of the group's objectives for the SG's subsection of the DSA website. Reports on past activities and notice of future activities

should be also be posted there. SG Convenors should send such information to the DSA administrator, both for the site and the monthly Bulletin, and try to ensure their section of the site stays up-to-date. Further development of SG site sections is possible in discussion with the DSA administrator. The DSA administrator will setup an email discussion/ mailing list for SGs as required, on the DSA domain.

12. Election of Convenors/Service Length – SG Convenors are encouraged to serve **terms of 3 years** (renewable) by arrangement with the members of the SG, and with the approval of the DSA Council in the annual review. Convenors should arrange for a replacement before resigning. The SG Coordinators and the DSA Administrator need to be informed of any changes in convenorships.
13. Closing Groups – **Any SG that fails to hold an annual meeting or any of the SG activities listed in paragraph 4 for two successive years and/or fails to file an annual report for two successive years will not receive any further financial support from the DSA, and will no longer be listed as a DSA SG.** The SG's papers can be archived on the DSA website.
14. Procedures for Organising and Funding Study Group meetings supported by the DSA – Groups must follow these procedures for organising events which involve DSA funding support:
  - a. Provide a) a statement of the objectives and nature of the SG meeting which is to be supported, and b) a budget for the SG meeting in question. Both of these should be sent simultaneously to the SG Coordinators and the DSA Administrator.
  - b. The submission of these documents should take place in advance of any publicity for the meeting, and at least two months before the date of the meeting.
  - c. The SG Coordinators will consult with the DSA Administrator before approving the two documents within a reasonable time frame.
  - d. All claims for reimbursement of expenses (including individual DSA members' travel expenses) should be approved by the SG Convenor before submission to the SG Coordinators. After countersigning by the SG Coordinators the DSA Administrator will be responsible for making payments in settlement of claims.
  - e. In the event of the SG Coordinators and/or DSA Treasurer being unavailable (e.g. due to a professional absence, holiday or illness) alternative arrangements for approval and administration of this system will be made, and will be publicised on the DSA website and in the DSA e-newsletter.

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