

# Building our Future

A Toolkit for Student Representatives



The Commonwealth



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## Foreword

Welcome to this Toolkit for Student Representation commissioned and developed in partnership with the Commonwealth Students' Association (CSA). Before introducing the content of this resource, it's worth taking a moment to reflect on how it came to be.

An inaugural steering committee for the CSA was elected at the 18th CCEM, with George Stanley Njoroge (Kenya) elected as chairperson. Regional representatives were also elected based on the Commonwealth regions to assist in setting out the CSA's Strategic direction, recruiting members, and rolling out its activities throughout the Commonwealth. In the lead-up to the 19th CCEM, a sub-group was appointed with the task of refining the Constitution that had been drafted at the 18th CCEM, which had proven to limit the CSA's capacity and organisation structure. This constitution was to be ratified at the inaugural CSA Congress in Nassau, Bahamas. Whilst much progress has been made, circumstances prevented a quorate meeting of the CSA and any agreements made were seen as provisional. Another steering committee was elected under the chairmanship of Joshua Griffith (Guyana). Nevertheless, the CSA continues with its role of supporting and developing active NSOs within the Commonwealth, as well as supporting initiatives to create new NSOs where none currently exist or where they have fallen into abeyance.

The report on *The State of Student Governance in the Commonwealth* (Day and Maxwell-Stuart, 2016)<sup>1</sup> presented research on the existence of NSOs within Commonwealth member countries and overall effectiveness and the extent to which they contributed to the development of education policy. The report also outlined some of the main issues, challenges as well as opportunities facing national student bodies in the Commonwealth.

The final section of the report highlighted some good practice approaches and strategies that enable students to be meaningfully engaged in decision-making at national and regional levels and went on to make policy recommendations on strengthening the role and involvement of student bodies that were considered through a draft report to ministers, stakeholders and participants at the 19th CCEM in June 2015. The report noted that NSOs have a long tradition of engagement at local, national and international levels from the mid-nineteenth century onwards, and student engagement is increasingly seen as a critical tool in developing a more relevant and inclusive curriculum; students have a part to play in these developments. The student voice is seen as important and NSOs have the potential

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[http://thecommonwealth.org/sites/default/files/inline/STATE%20OF%20STUDENT%20GOVERNANCE%20REPORT\\_FINAL%20PRINT%20VERSION.pdf](http://thecommonwealth.org/sites/default/files/inline/STATE%20OF%20STUDENT%20GOVERNANCE%20REPORT_FINAL%20PRINT%20VERSION.pdf)

to act as partners in developing effective student engagement strategies. NSOs also have a good deal of potential power and influence through the collective action of their members in bringing pressure to bear on decision-makers, but also in supporting an experience of a democratic environment that sets a benchmark for wider society. How students see themselves and how decision-makers see them has an impact on how seriously the issues that student representatives raise are treated and the overall attitude exhibited towards them by decision-makers. In some countries, students' unions have been increasingly politicised, and this can lead to a dampening of wider student participation, as the NSO may be seen as pushing one specific agenda. There are many different types and approaches to NSOs, and the extent to which they are seen as part of an educational sector/civic society varies. Whatever the style and approach, it is clear that involvement in an NSO can facilitate the development of transferable employability skills.

It was to facilitate the latter that one of the recommendations of *The State of Student Governance in the Commonwealth* is to develop a toolkit to facilitate the development of NSOs in those countries that do not currently have one (currently 51 per cent of Commonwealth member states).

The Commonwealth Secretariat's Education Unit and Youth Division have been responsible for following up on decisions made at both the 18th and 19th Conferences of Commonwealth Education Ministers (CCEM), which have made specific reference to students and their organisation. These decisions resulted in the following main courses of action:

- Supporting the development of the Commonwealth Students' Association (CSA);
- Commissioning and publishing a report on the State of Student Governance in Commonwealth member countries; and
- Commissioning and publishing a toolkit on approaches that can be taken in the establishment of National Student Organisations (NSOs).

The resources in this toolkit will, it is hoped, help to frame discussions among student leaders and volunteers on ways in which they can approach the process of creating a national student organisation in their country. The materials are very much focused on starting something new, but some of them are equally relevant for existing NSOs that are seeking to review and evaluate their activities. Whilst the resource has been commissioned and developed through the CSA it is very much hoped that student organisations beyond the Commonwealth will also use the materials and that this toolkit and any subsequent editions will help to spread best practice in student representation globally.

## **Acknowledgements**

This toolkit would not have been possible without the support and hard work of Mike Day (Project Lead and Author), Rebecca Maxwell-Stuart, Layne Robinson, Sushil Ram, Bhagya Ratnayake, George Stanley Njoroge, Kemesha Kelly, Kate Kiama, Jim Dickinson, Stephen Coole, Sam Harris, Rob Griffiths, Bindz Patel, Rob Shorrocks, Nick Berg, Graeme Wise, Mike Williamson, Ian Williamson, Keelin McGrogan, Daniel Francis.

## **A: Introduction**

The first section of this toolkit will:

- Outline the purpose of the toolkit
- Explain the terms used
- Outline the contents
- Provide a summary roadmap for using the toolkit

### **A1: The purpose of this toolkit**

The toolkit consists of a series of stand-alone sections containing both narrative and active exercises to help facilitate discussions and creative thinking amongst student leaders and volunteers who are seeking to establish a national student organisation in their country, or indeed to strengthen the organisation they already have.

### **A2: Definitions used in the toolkit**

- **National student organisation** is an umbrella organisation consisting of students' unions and other student representative bodies that seeks to provide capacity-building support for its members and national representation for its members and their student beneficiaries, advocating on behalf of students at a national level.
- **Students' union (or association, or guild)** is a representative body of students at an institution of further or higher education.

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#### **A4: Toolkit roadmap**

The focus of this toolkit is on the creation of a new NSO and the activities that will help to bring this about, rather than providing guidance for maintaining and developing an existing organisation. However, some of the material in this guide will be of use to such organisations. In creating an NSO your team will need to be clear about why you wish to create an organisation, who you are seeking to represent and work on behalf of, what you seek to do and how you will go about building and creating a new NSO. The sections of the toolkit can be clustered as follows, although there will be times when your debates and discussions will overlap.

Question	Toolkit section
WHY - why do you want to create an NSO?	Purpose, Vision and Mission (C)
WHO - who are you seeking to represent?	Identifying, developing and growing membership (B) Diversity and Inclusivity (G)
WHAT - what will you do on behalf of those you are seeking to represent?	Purpose, Vision and Mission (C) Policy development, advocacy and political engagement/influencing (H)
HOW - how will you make sure that you can achieve your purposes on behalf of those you are seeking to represent?	Purpose, Vision and Mission (C) Governance and Democracy (D) Finance, funding and infrastructure (E) Communications and Marketing (F) Sustainability and Continuity (I) Capacity building for your NSO (J)

Establishing an organisation that can legitimately represent the entire student body of a country can be difficult and complex. There will be a range of views within the student body and in other areas of public life about the extent to which students should have a say on the development of their student experience, the extent to which they should engage in the politics of a country and whether that engagement should focus only on educational matters or on broader social and economic issues. The main focus of this toolkit is to encourage debate and discussion on what an umbrella student organisation can do to support the student voice in a country and foster political dynamics that will develop the citizens of the future. The content has been developed through a synthesis of practice from national student organisations throughout the world that have withstood the test of time.

The materials here are based on the assumption that having an umbrella organisation within a country where debate can take place and collective agreements emerge is a good thing. This is also in agreement with the role which youth and student organisations have been accorded in monitoring the Sustainable Development Goal 4 as captured in the UN's Framework for Action.<sup>2</sup> However, it also goes along with the responsibility to build strong and robust structures that allow all voices to be heard, to involve and engage members and create an organisation that represents the generality of students. The key element is representation, as noted by NUSUK President Digby Jacks (1971-1973) in his book *Student Politics and Higher Education* (Weidenfeld and Nicholson, 1975):

'Representation must never be seen, except in strategic and practical terms, as an end in itself. Too many union officers see it as a question of communication and merely sitting on the appropriate committee. The purpose of representation is to secure education and social change.'

There are many instances in many countries where students have made the case for and brought about positive change. It is hoped that by bringing students together to speak with a collective voice, that proud tradition can continue.

#### **SECTION SUMMARY**

In this section we have outlined the purpose of the toolkit and explained some of the terms used, outlined the contents of the toolkit and provided a summary roadmap on how to use the toolkit.

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<sup>2</sup> <http://www.un.org/sustainabledevelopment/education/>

## B: Identifying, developing and growing the membership of an NSO

This section of the toolkit discusses:

- The initial stages in developing an NSO
- Who your members are and who you are seeking to represent (and why)
- Getting to know your members
- Analysing what type of membership is best for your situation
- How you will set about consulting potential members and sector/government decision-makers

### B1: Initial stages in creating an NSO

The way in which you set out on the journey to create an NSO will, necessarily, be unique to the situation and history of your country. The **catalysts that have contributed to the creation of NSOs** where they are well established are many and varied. In Europe, the horrors of the First World War created in the surviving generation of students a desire to promote greater international understanding and co-operation on a global basis. To that end a number of NSOs were created to facilitate membership of a newly created international student body, the Confederation Internationale des Etudiants (CIE). Some NSOs were also developed in line with the development of the National Union of Students in England and Wales (following their creation in 1922) in Canada, Australia, New Zealand and South Africa. The tradition of student debating societies was certainly transferred to a number of universities in countries that then formed part of the British Empire. The post Second World War period saw new student internationals develop, and in particular saw student movements grow and develop as part of a general movement in opposition to colonial rule and towards self-determination. It is interesting to note that many NSOs were born out of conflict: a response towards building a new future and leaving the mistakes of the past behind. In these situations student leaders saw the need to bring people together as part of national or international reconstruction. Some of those countries seeking to develop a new NSO may well be in a post-conflict/political turmoil situation whilst others may find they are building from a position of stability and peace. Whichever is the case your approach to creating an NSO and bringing people together will be influenced by the more recent history of your country.

The **initiative to create an NSO** may come from students, groups of students or student organisations who can see the benefit of creating a national representative body through which the needs and aspirations of students can be channelled to decision-makers at a national level. The initiative may come from the Ministries of

Education or Youth and/or the education sector in a country which see the value in having a single representative body to discuss the situation of students and receive their input in policy-making. Whatever the direction the key to creating an effective NSO in any country is making sure that it is credible and has the confidence of the student membership. An NSO that is perceived to have close links to government (whether this is true or not) may not command the confidence of its members; equally an NSO that is perceived to be led by or dominated by one specific political perspective (whether linked to government or opposition) will also be treated with suspicion by students and ministers alike. **Developing legitimacy** is a critical part of creating an effective NSO.

The initial group who come together need to agree what stages they need to go through to persuade students, students' unions and national decision-makers and make a new NSO a reality.

- Are we clear about why we want to develop an NSO? What is our vision? (See Section C)
- If we do - who are the members? Where are they?
- Who do we need to speak to in the education sector and in government?
- What key activities will we undertake?

Section C goes into more detail on how you can go about **developing a vision and mission**, as well as applying theories of change to the work you are trying to do. In these initial stages your group will need to:

- Develop a draft proposal to create an NSO
- Develop a strategic report that outlines the potential for the organisation that can be consulted by the membership
- Call a meeting of student representatives in the country
- Form/elect a representative group to take the work forward. This could be your steering committee
- Hold a series of development meetings in which the development group or steering committee can create a vision for the role of the NSO and how it will go about its business
- Hold an inaugural meeting of the new organisation (NSO) with the proposed membership and agree constitutional documents and a budget, elect officers and appoint other officials

Below we outline some of the issues to be considered in agreeing who your membership is.

## **B2: Who are our members - where are they?**

Whatever the catalyst that has motivated you to create an NSO, one of the first and most important discussions will centre on the scope of membership. For your NSO to be a credible representative of student opinion then you need to be very clear about the student population you are trying to represent, what are the range of course programmes/faculties, what types of institution and the overall demographics of the student population. To help this discussion, the next exercise looks at ways in which you can start of the process of analysing who your membership are or might be. Of course an NSO might well extend its membership focus beyond tertiary education to include secondary school students as well; much will depend on the circumstances in your country.

### **B2.1: EXERCISE - Getting to know the membership**

The overall aim of this exercise is to get your steering committee/development group talking about what your potential NSO membership looks like. It also helps to identify what further research members of the team may need to do.

#### **Activity: Getting to know your members**

Pre-prepare some flipchart paper with the name of every relevant educational institution that operates in your country.

1. Place these flipcharts around the room on the walls
2. Divide the group into small sub-groups or pairs
3. Give each sub-group a flipchart to start with, and ask them to write down everything they know about their chosen institution
4. After a couple of minutes ask the groups to move in a clockwise direction and do the same thing for another institution
5. Do this until you have information written down about each of the institutions

#### **Debrief**

6. Key questions and information to draw out are:
  - a. Do we know if there is a students' union or any level of student representative activity/ are there other student organisations associated with the institution?
  - b. What statistics do we have (or need to find out) on student numbers, demographics, course profiles for the institutions we are discussing?
  - c. What is the attitude of the institution's administration to student representation? If it exists what is the relationship like? If it doesn't exist - do we know why?
  - d. What issues do we think or know are of concern to students at a specific institution? Do some of the issues crop up at different institutions - what issues could be taken up nationally?

- e. What is the history of student representation - do we know of any barriers or conditions from the institutional authorities that might prevent a positive response to developing student representation? (This could be in the form of some demonstration, political upheaval in the past - remember the leaders of universities and colleges have much longer memories than you as student representatives!)
  - f. Do we have any key contacts at the institution - whether that be in university or college management or, perhaps crucially, amongst the student body; who are the 'opinion formers' and leaders at a local level? Who will help us with our objectives?
  - g. What institutions do we wish to include: tertiary and secondary? Public and private? Now is the time to have the debate on your membership scope.
7. Go through each of the flipcharts with the whole group - check on facts, discuss perceptions, in particular try and identify if there is already some form of students' union or student representative structure in operation.
  8. Check with the group that the steering committee has a broad enough membership - what is the gender split? Are any communities or linguistic groups not represented on the committee? How can you reach out to those who may not be around the table?
  9. Finish the exercise by identifying what research you need to carry out to fill any gaps in your knowledge (plus, of course, you will need to check the facts that have been given).
  10. Agree who will write up the information you have collated so far and circulate it to group members.

The final outcome of this process (with follow-up research) would be a diagnostic/scoping report that outlines:

- The known state of student representation in every relevant educational institution in your country.
- A list of contacts and allies across the country who can be brought in to take the project forward.
- An idea of allies and supporters (and the opposite) amongst the management of universities and colleges in your country.
- A summary history of student representation - student activism in your country and its potential bearing (if any) on the development of your NSO.
- An idea of some of the key collective concerns and issues that students might have (further survey research may well be necessary in this area).
- Statistics on student numbers and demographics - in particular looking at gender issues and the representation of minority communities within your potential membership.

## B2.2: What type of membership is best for you?

Having identified who you are seeking to represent and where they are located, you then need to discuss the overall nature of membership; how they can join your NSO and who will be allowed to join. This may well depend on the arrangements in your own local and regional student organisations, university student associations and thematic clubs with inter-university presence, and whether you wish to seek individual membership or organisational (students' union) membership. There are a number of combinations, all with pros and cons. There are two main approaches:

- Membership is **voluntary**; a student upon enrolment opts into and actively joins either a local students' union or a national students' organisation or both.
- Membership is **automatic** and a student upon enrolment is automatically a member of their local students' union or national students' organisation. There may be the option to 'opt out' linked to this model designed for students who may have some principled objection to being in a membership organisation.

There is an on-going debate about the advantages and disadvantages of voluntary as opposed to automatic membership. That debate is further complicated by the question of whether an individual student should pay to be a member of a students' union or not. If direct payment is involved, then what might be seen as automatic membership can feel compulsory. When resources are tight, as they often are for students, this can result in some tensions. Other students may be less concerned about the money but more worried about whether they have the time to participate given the pressure of their course and their personal/home life and whether they would see any personal return for their fee. Others again may be concerned that the collective view that a students' union might reach might be unrepresentative of their own feelings and beliefs. These are just some of the complexities to consider when looking at which membership model to adopt. We will go into more detail with the next exercise.

## B2.3: EXERCISE - Analysing membership models

### Activity

The table below shows a range of membership models. The approach taken at a local or regional level will have an impact on final decisions concerning your NSO's membership approach.

1. Divide the participants in your group into smaller discussion groups
2. Prepare and hand out a sheet based on the table shown below
3. Ask each group to go through each model and identify what they see as the pros (advantages) and cons (disadvantages) of each of the models

Model	Pros	Cons
Students are voluntary members of their own students' union		
Students are automatic members of their own students' union		
Students' unions are voluntary members of a national students' organisation		
Students' unions are automatic members of a national students' organisation		
Individual students are voluntary members of their national students' organisation		
Individual students are automatic members of their national students' organisation		

### Debrief

4. Ask each group to share their thoughts - going through one model at a time. Record key points on a central flipchart. Some ideas and thoughts on each one are summarised in the completed table below.
5. Ask the group which model they think would be best suited to your own national situation, and why.
6. Capture key points from the discussion and circulate a report outlining the preferred model or models.

<sup>3</sup> Thanks to the participants in the CSA Student Governance Toolkit Pilot and Africa Regional Capacity Building Workshop (Strathmore University, Nairobi, Kenya 29-31 May 2017) for feedback and development of this section.

Model	Pros	Cons
Students are voluntary members of their own students' union	<p>The idea that students can join if they want to plays well with the public and university or college authorities. If the students' union is good then surely they will join?</p> <p>Members who join will take up responsibility and are more likely to pay their dues. These members are more likely to be more active. Fosters an environment of creativity and innovation.</p>	<p>People (not just students) tend not to proactively join organisations - this may result in the students' union committing significant resource to recruitment each year. This model also tends to favour those with the time, money or with a specific agenda to be active. A smaller membership means limited funds. Less diversity with poor or inadequate representation.</p>
Students are automatic members of their own students' union	<p>If everyone is a member then everyone has an equal responsibility and platform to take part in the activities and policy stance of the students' union. Students have a choice whether to take part or not - the same choice they have when they graduate and participate as citizens of their country.</p> <p>More diversity in the membership and potentially more active members. No need for recruitment drives (but do not take members for granted).</p>	<p>Some students or politicians may see this as compulsion and may be worried that students may be coerced into supporting positions or actions (by default). Students may feel no obligation to participate and may resist paying fees/dues. Limited co-operation if something is imposed. Tension and hostility within the membership?</p>
Students' unions are voluntary members of a national students' organisation	<p>This allows the student body as a whole to be involved in reviewing whether or not they wish to join a wider collective to express their views at a national level. The students' union would vote to join through their own democratic structures.</p> <p>More likely to pay fees. Payment will lead to greater participation and commitment. Clear path for student leaders to take up other leadership positions.</p>	<p>An NSO may have to commit resource to persuading students' unions to join or maintaining them in membership. Students' unions themselves might use the threat of leaving to put pressure on an NSO's leadership on specific issues. This situation might allow a 'market' to develop in which disgruntled student leaders seek to establish a rival NSO. If only a proportion of students' unions join the NSO it can damage credibility as well as lead to a lack of funds. Less likely to have an impact on policy.</p>

<p>Students' unions are automatic members of a national students' organisation</p>	<p>All students are clear that they are part of a wider body and there is no ambiguity about its status. Higher membership with greater funding. More bargaining power and therefore more effective. Greater diversity and inclusion.</p>	<p>Students may become unhappy with the approach and stance taken by an NSO - it might become too close to government, or indeed the opposition - leaving some students' unions or students excluded from the organisation. More friction between factions - power struggles. Might be difficult to implement decisions.</p>
<p>Individual students are voluntary members of their national students' organisations</p>	<p>This allows for a direct opt-in relationship between students and the NSO - they have joined because they want to. A more focused and united front? Potential for more grassroots participation.</p>	<p>The students who join in this way may well be more privileged; they may have the time and resources to be active members. This also creates the conditions where a group from a specific political persuasion can apply a disproportionate amount of influence on the activities, direction and policy stance of the NSO. Higher membership fees. Less influence on government policy due to limited bargaining power.</p>
<p>Individual students are automatic members of their national students' organisation</p>	<p>Students are clear that they are part of a national representative body. Direct channel to air grievances and issues. Easy to channel ideas?</p>	<p>Students may become disgruntled if the NSO is taking a stance with which they disagree. Less focused. Decision-making might be difficult, and it will be hard to organise and mobilise members.</p>

As part of your group discussions you may also want to consider how your future leadership might interact with the membership model you feel is most appropriate.

#### **B2.4: Membership - power and direction**

The models discussed in the previous section can be further developed through agreeing or identifying where power and direction might come from in your proposed NSO.

- A **centralised** model is, in effect, a top-down form of organisation where paid members agree to act in concert with the recommendations of the leadership.
- A **federal** model is one where there is a high level of autonomy for local/regional students' unions or organisations that come together, through the NSO, to act on matters that require a response from national government or sector bodies.
- A **confederal** model is one where students' union members agree collectively, through debate, the approach they take to national issues and then empower the NSO leadership to act on their behalf. They will also identify what support they need at a local level.

### **B2.5: EXERCISE - Which membership model suits us?**

1. Divide the group you are working with into pairs and circulate the three suggested approaches listed above.
2. Summarise any conclusions you may have reached concerning voluntary and automatic membership.
3. Ask each group to discuss and agree which of the three models they think is most appropriate to the situation in your country and how that links with the preferred membership model or models that the group have discussed.

### **Debrief**

4. Ask each group to feedback and record key thoughts on a flipchart. You may find it helpful to use these examples (you may well think of others); some thoughts may apply to more than one model:
  - a. A **centralised model** may lead to a level of disempowerment of student activities and groups; it is a top-down approach rather than bottom-up. It may allow for easier and quicker decision-making, but any such leadership would need to strongly convince decision-makers that they were speaking on behalf of the vast majority of students.
  - b. A **federal model** - may well be most appropriate if the structure of your country is federal; it is important that student representative structures mirror decisions that impact on student lives.
  - c. A **confederal model** seeks to devolve power as near to the grassroots as possible, but equally could result in different approaches being taken to a policy issue. The NSO would only carry out those activities that their membership had agreed.

5. Write up the main points of the discussion - include the main points in any diagnostic report you are preparing.

Now that we have developed our thinking on who our membership might be and how we might engage with them, the next critical part is agreeing what the overall purpose, vision and mission of the NSO will be.

#### **SECTION SUMMARY**

Through engaging in the discussions and exercises in this section you will have identified the initial stages in creating an NSO, discussed and agreed the NSO's scope of membership, analysed and agreed which membership model is best suited to your needs and discussed the power relationship between your membership and any elected leadership

## C: Purpose, vision and mission

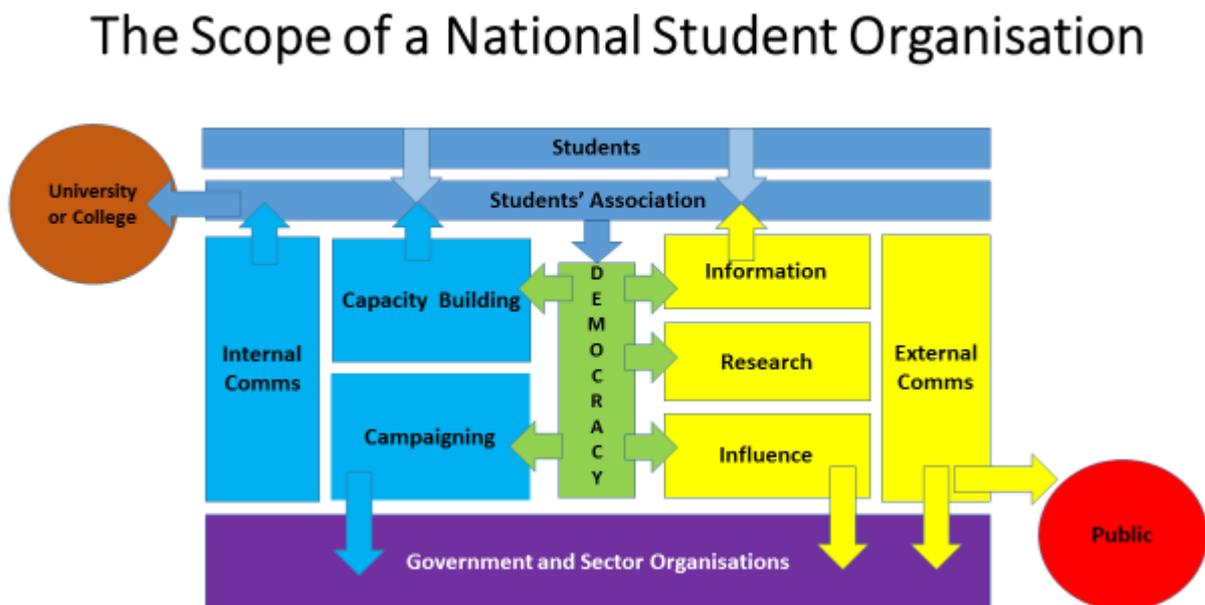
As discussed above, any NSO derives its legitimacy from its members, whether that be local/regional student organisations, students' unions or individual student members. This section considers the range of activities an NSO might be engaged with, remembering that if you are setting up a new NSO you may seek to prioritise some areas above others, at least in the short term. In this section we will examine:

- What an NSO can do
- Developing strategic themes
- Examining what other organisations and stakeholders think of an NSO
- Analysing the future potential of the NSO
- Developing a vision for your NSO
- Developing a mission for your NSO
- Agreeing your values
- Ethics in the student movement

### C.1: What do NSOs do?

Figure 1 depicts describes the way in which students' unions can be linked to an NSO and the typical kinds of activities and support an NSO can provide and engage in.<sup>3</sup>

Figure 1: The scope of a national student organisation



<sup>3</sup> Model developed by Mike Day as part of the report *The State of Student Governance in the Commonwealth* (Day and Maxwell-Stuart, 2016).

At the top of the diagram are the students, who should be the key focus of any NSO. Individual students may find it difficult to approach their university or college about any problems or issues (educational or personal) they may be facing; they may also need an infrastructure that allows them to meet together, socialise, establish clubs and societies of mutual interest, play sport and generate a sense of belonging and loyalty to their institution. To facilitate this, students' unions have often been created, with their member students and playing a central role in the life of the institution. Any NSO needs to do two things:

- Provide support for local students' unions and their officers
- Act on behalf of their members in presenting student issues and concerns to national decision-makers.

Typically, therefore, an NSO will engage in:

1. **Capacity building** - supporting local students' unions by providing constitutional and legal advice, training and development events for student leaders, advice on organisational development and, at times, mediation and support when there may be tensions within the student body.
2. **Research** - student concerns and aspirations for change need to be evidenced and based on genuine, deeply held feelings from the student body. Such research underpins advice and **information** that an NSO might give to a local students' unions or papers and policy discussions that any NSO might have with government, sector organisations and other national decision-makers as part of their overall **influencing** work.
3. **Campaigning/Advocating** - there will be times when students feel they need to back up the representative work carried out by an NSO by creating greater awareness of an issue amongst the student body and the wider public or making the case for a change of policy that they believe will benefit students and make their lives better.
4. **Communications (internal and external)** - it is crucial that any NSO has robust communication structures so that its members are able to influence policy development and are clear where, when and how they can engage in debate and discussion with their peers. They also need to be aware of the range of services any NSO might provide.
5. **Democracy** - central to the diagram is the democratic control and overview of all the NSO's activities. The views expressed at a national level need to be clearly linked to debate and discussion at a local level (class, course and faculty representatives are a vital part of this process). If local democracy is robust and representative then this in turn enhances the legitimacy of any NSO.

All of this requires a positive environment with responsibilities and actions for student organisations, stakeholders and government departments. Investment and support in NSOs is not just of benefit for students; it builds an experience of active citizenship and helps develop values that students and student leaders will take with them in their future careers. Some of those student leaders will assume leadership positions across a range of disciplines - indeed many Commonwealth leaders today will have begun their careers as student leaders.

The checklist below has been created in order to help student organisations and stakeholders identify areas of best practice, and areas for improvement. The developers of this toolkit wish to stress that this checklist has been designed to support the diagram in Figure 1, and that there may be areas or examples not covered, as it is important to understand the differences of contexts and cultures within the Commonwealth. We will discuss and analyse each of these areas throughout the toolkit. It is certainly recommended that your initial development group and any more formal steering committee, mandated with establishing a national student organisation in lieu of the election of executive officers once the structures are set, are given the checklist, or a version of it, at the earliest opportunity.

### **1. Capacity**

- The NSO is able to lead or facilitate officer development programmes that provide training for elected officers and volunteers in students' unions.
- Students' unions are able to access advice and guidance on democratic structures, staffing and organisational development support from (or facilitated by) the NSO.
- The NSO is able to support its members to provide effective representatives both internally within the institution and externally to national bodies.
- Student leaders have a clear view of the individual and collective benefits of taking on a leadership role.
- Opportunities to contribute and to become more widely involved in the NSO are widely promoted and local officers encouraged to contribute at a national level.
- The various NSOs should continuously develop capacity to monitor and evaluate their work as well as keep track of changes in issues that are of concern to students' welfare in their domain. With such grounding that they will gain better standing when engaging policy-makers.

### **2. Campaigning/ Advocating**

- The right of student bodies to campaign locally, regionally and nationally on behalf of their members is recognised and supported by the government, decision-makers and wider society.

- Volunteers and activists have access to developmental events that look at ways they can influence public opinion and civic life in their country. The NSO seeks to empower local student groups to take up issues of concern to them.

### **3. Communications (internal and external)**

- Student organisations/members are kept up to date with the activities of the NSO through regular mailings, web presence and social media.
- The NSO communicates agreed policies and student opinion through the national media and other outlets.
- The NSO has access to the requisite communication tools.
- The NSO proactively reaches out to its members and seeks to engage them in the activities and governance of the organisation.
- National student representatives make themselves available for accountability and scrutiny by their members.
- The NSO ensures that it is in regular contact with its members and that there is a clear communication plan for the organisation.
- The NSO has clearly designated headquarters or centres at which it can be contacted and officers/volunteers can work.
- The NSO has systems to seek and evaluate feedback and opinions from students, as well as systems that can evaluate its overall impact in wider society. Members are able to explain what the NSO does on their behalf and how they can direct its overall work.

### **4. Democracy/governance**

- There are a series of written constitutional and governance documents for the NSO, freely available to members, that describe how members can have input into the collective NSO's policy development. These procedures are reviewed at agreed intervals to take account of new developments and good practice.
- Student needs and aspirations are debated openly and contribute to the policy development process. The members are at the heart of the democratic process.
- There is a long-term strategic plan for the NSO, agreed by the members of that organisation, that can accommodate changes in policy and manifesto pledges made by elected officers. The plan relates directly to the needs of its members, both current and future.
- The NSO has a clear statement outlining its fundamental purpose linked to an inspiring vision and agreed mission (outlined in the strategic plan). The long-term outlook, or vision of the NSO, should remain as neutral as possible to the NSO's present dynamics, no matter the personalities in office.
- An annual report outlining the organisation's impact is circulated to its members.

- The student representative body has full-time paid officers who are able to devote their time to channelling student opinion to decision-makers. No matter how lean or heavy this staff is, it is essential that it exists to ensure a separation of governance and day-to-day operations, and to ensure that the organisation has a semblance of perpetual continuity in service - even before, during and immediately after elections of office bearers, which may be held on an annual basis, resulting in a high turnover of executive officials.
- The NSO has robust election systems that enable candidates to get their message across and are seen as free and fair. All members are empowered to vote and are able to make a considered judgement about who to vote for. There is a clear procedure for removing elected officers from office if required.
- The NSO is a student-led body; open, transparent and accountable to its members, and they are able to influence the political, financial and strategic direction of the NSO.
- All elected student representatives for the NSO are able to access training and development to develop the essential knowledge, skills and confidence to carry out their roles and provide effective leadership. There is an agreed induction programme.
- The NSO is able to attend international meetings to develop and exchange ideas and good practice, through the CSA and other relevant bodies such as All African Students' Union, European Students' Union and so on.
- The NSO has access to, or will proactively seek, external advice and guidance and can utilise independent guidance for elections, legal compliance and financial scrutiny.
- The NSO has access to a regular source of income through agreed membership fees, government grants and funding from other bodies. Where feasible, the NSO is able to engage in fundraising for additional activities.
- A budget outlining projected income and expenditure is presented to the membership annually, as are audited accounts for the past financial year.
- There are clear financial procedures with safeguards to ensure the proper stewardship of resources.

## **5. Research**

- The student representative body has sufficient infrastructure to enable it to employ research staff to support the elected student representatives, or a research committee could be created made up of volunteers from some of the member students' unions or associated institutions.
- The student representative body is able to back up its policy statements and submissions with evidence of student opinion.
- Student leaders have access to the necessary information to enable them to brief and support their members as well as participate in national policy development.

## 6. Information

- The NSO is able to provide background information and useful guides to elected representatives in its member students' unions.
- Research, briefings and statistics that explain current policy developments are produced in an accessible format for students' unions/members.
- Efforts should be made to step-down and disambiguate issues to ensure that all students are aware of the concerns and the agenda that is being advanced.

## 7. Influence

- Government ministers and sector officials regularly explain the extent to which they value the input and participation of students. Student feedback is seen as important and the NSO is seen as a 'critical friend' at a national level. This 'friendship' should be formalised through an MoU where there is no legislation to this effect. The ministries should also work to assist NSOs to obtain good legal standing and registration in their territories, to the same level and status that teachers' unions have.
- Student representatives are able to secure regular meetings with a country's education minister and officials in the ministry. The NSO is constantly developing its relationships with the government and other decision-makers on behalf of and for the benefit of its members.
- Government respects the autonomy and supports the accountability of the NSO.
- Student organisations are seen as important partners within universities and colleges.
- There are formal mechanisms for student representatives to have input into legislation that has an impact on their educational experience, and there is evidence of their input.
- There is legislation that states that student representative bodies should be consulted about matters that have an impact on their experience.
- There are other, more informal, opportunities for decision-makers and student representatives to exchange views and ideas.
- Student representatives are engaged with sector agencies focused on education, youth and employment.

### C1.1: EXERCISE - What can an NSO do in our country?

1. Explain Figure 1 to the participants in the development group (NOTE: you can usefully use this exercise with local student organisations to help generate discussions the range and scope of your NSO). If possible show the diagram on a screen.

2. Using flipcharts, cardboard, glue and any other creative products ask the group to create a large version of the diagram. Place it on the floor in the centre of the room.
3. Then ask each member of the group to write down activities they think their new NSO should be engaged with on sticky notes - at this stage the idea is to generate as many as possible.
4. Then invite group members to place the sticky notes on the most appropriate part of the diagram. Don't sort them at this stage.
5. Go through each area and the sticky notes allocated there. Cluster those that are the same or similar together and put an overall summary note (in a different colour) on top. When you have completed the process you should have a series of summary activities for each area of the diagram.
6. Generate a discussion around each of the areas - what is practical? Which do they think is the easiest area to deliver on? What do they think is the most important area of work?
7. Record key points of the discussion and end the session.

The outcome of the exercise will highlight a series of activities that could be carried out by your NSO. However, you have presumably embarked upon this process because you, your colleagues and students you have spoken to have a vision of what your NSO should be doing and the role it can play within the education sector and wider civic society. If your NSO is to succeed, then, apart from the nuts and bolts of governance, democracy, rules and regulations, elections and officers, you need a longer-term strategic direction. The next section will discuss a range of approaches to this.

## **C2: Developing a strategic direction**

The first step in developing a strategic direction is to analyse the environment you are operating in. What is your current situation? In this first part of the process you will be answering questions on what work the proposed NSO might be able to develop in the short and long term, and what things might affect the future of the organisation. What do your members both want and need? The exercises in the rest of this section will promote discussion on

- Developing strategic themes
- What do others think of us?
- SWOT analysis
- PESTLE analysis
- Stakeholder analysis

## **C2.1: EXERCISE - Developing strategic themes**

Strategic themes help an NSO to prioritise and make sense of its work and communicate it easily to the wider membership. This exercise looks at creating strategic themes that will, in effect, summarise the main areas of work for the NSO.

1. To initiate this exercise, return to the agreed range of activities that were discussed in exercise C1.1.
2. Ask the group to look again at the clusters they have agreed and to consider what headings could be said to be 'upfront' and visible to the membership and what might be seen as more 'behind the scenes'. For example, representing students and campaigning for change is something that students will see, whereas activities like communications, administration and looking after the money are behind-the-scenes activities that enable the other things to get done.

### **Debrief**

3. Explain that the distinction they have made between the two types of activities means they have come up with draft STRATEGIC THEMES and ENABLING STRATEGIES.
4. Emphasise that these are only draft at the moment - but they will be revisited in future discussions.
5. Thank the group for participating and move on to the next session.

Having agreed some core strategic themes, we will now discuss other aspects of strategic planning that might impact upon your NSO.

## **C2.2: EXERCISE - What do others think of us?**

In an established organisation it is worth developing systems that keep you informed about membership opinion and trends. In creating a new NSO it's worth discussing whether you can seek a more general student opinion through social media channels, focus groups and direct interviews. You may have access to more general surveys conducted within the education sector, within institutions or beyond. Any information you can generate or access is useful data for discussing and agreeing your overall strategic direction.

1. Explain that everyone taking part in these discussions on strategic development will have a view on the future of the NSO and what needs to be done. In this session we are taking the opportunity to see ourselves as others see us.
2. If you have any data or survey results circulate and ask people to discuss the findings in pairs - ask them to prepare a summary of the report.

## Debrief

3. When everyone gets back ask each group to report back their findings and generate a discussion on what they have found out - is it what they were expecting or are there some surprises in there?
4. Beyond the data they have seen, what do members of the group think students would say? Is there a difference between what student leaders may see as the role of an NSO and what students think? If so, what is it? (For example if you were to ask students what they think their local students' union should be doing, they may well focus on clubs, societies, social events and employability issues. A students' union president may think that representation and campaigning to improve the situation of students is more important.)
5. Capture the key points and move on to the next session.

### **C2.3: EXERCISE - Conducting a SWOT analysis**

Having discussed what could be done, potential strategic themes and what you know about your membership and what they think of you, the next stage is to **conduct an audit of what advantages and potential your NSO has, and what barriers or situations may arise to prevent you achieving your aims.** To do this it's worth conducting a simple SWOT analysis. This is a technique that was developed by Albert Humphrey at Stanford University in the late 1960s/early 1970s. The concept was further developed by Urick and Orr who settled on the acronym 'SWOT', which stands for:

**Strengths** - what are we good at?

**Weakness** - what are we not so good at?

**Opportunities** - what can we take advantage of over the next year, or couple of years, and

**Threats** - what things might happen that could threaten our future as an NSO?

To run the session, you will need a room large enough to have four discrete areas for discussion. Each discussion zone should have a flipchart and pens available. You will need a bell or something else that makes a loud noise.

1. Explain that the idea is that we can take an honest look at what potential strengths we have; what we are perhaps not so good at; what new opportunities are out there that we can take advantage of; and what threats are out there that might stop us or restrict us in creating an NSO.
2. Explain to the group that they should feel free to use the information generated by previous discussions in this exercise.
3. On prepared flipcharts write the words **Strengths** (what are we good at? What do we have that others don't? What do other people think we are good at?), **Weaknesses** (What are we not so good at? What areas can we do better at?

What do others see as our weak areas?), **Opportunities** (what opportunities can we seize on? What developments or trends might help us?) and **Threats** (What threatens our future? What will stop us doing what we do? Do our weak areas open us to greater threat?). Write the four words on separate sheets and stick them up around the room in the four discrete zones for discussion.

4. Divide the participants into four groups and ask each group to start at a different discussion zone.
5. Ask them to record what they think on the sheet in response to the heading - explain that they will have three minutes at each zone and when the bell rings they have to move away from the zone they are working on to the next zone in a clockwise direction. Do this until each group has had an opportunity to record thoughts and ideas on each of the zones.

### Debrief

6. Debrief by getting the participants to walk round each of the zones and generate discussion on each one. Check whether everyone agrees with what has been recorded.
7. Explain that opportunities and threats are mainly concerned with the external environment, while strengths and weakness are usually more focused on the internal environment; also that strengths and opportunities can be seen as positive whereas weaknesses and threats are negative factors.
8. With each sheet dig a bit further into what the participants have written, using the questions in the box below. Use a different coloured pen to add notes to the flipchart sheets for each zone, starting with strengths and weakness. Remember that at this stage the group will be looking at the potential of the NSO.

**Strengths** - what is it that makes us good at this?

**Weaknesses** - why are we weak or not so good in this area?

9. **Pause** and ask if the participants can use any of the factors that make them strong to increase their performance in areas that they see as weak. Note down the reasons, both positive and negative, that they come up with, then move on to discussions about opportunities and threats

**Opportunities** - can we minimise some areas of weakness by seizing some of these opportunities? Can we use our strengths to seize them?

**Threats** - can we use our strengths and opportunities to mitigate the threats we face?

10. Once again make sure you record all the ideas expressed for use in any final report.
11. Thank the participants for taking part and explain the next steps.

#### C2.4: EXERCISE - Conducting a PEST analysis<sup>4</sup>

A PEST analysis works in a similar way as a SWOT. Whereas the SWOT will look outwards from within your organisation, the PEST stands on the outside looking in, to ask: what will be the Political, Economic, Social and Technological factors that will impact on the development of your NSO? As with the SWOT exercise you will need a room large enough to have four discrete areas for discussion. Each discussion zone should have flipchart and pens available. You will need a bell or something else that makes a loud noise.

1. Explain the overall purpose of the PEST analysis; in this exercise we will be looking at what may happen over the next 5-10 years as the new NSO develops and grows - what will help it and what might hinder it?
2. Explain to the group that they should feel free to use the information generated by previous discussions in this exercise, in particular the ideas generated in the 'Threats' and 'Opportunities' section of the SWOT analysis.
3. On prepared flipcharts write the words **Political** (what are the political dynamics like at the moment - for both students and wider society? What legislation impacts on students in a positive or negative way? What new legislation is in the pipeline? What legal obligations do you have?), **Economic** (How will overall economic performance impact on your NGO development and wider society? What will be the impact on students and tertiary education? Will you be able to get secure funding? What impact will the economy have on support for an NSO?), **Social** (What social factors will impact on students and the development of your NGO? Will there be more or less students? Is the tertiary education sector expanding or contracting? What is the impact of private provision? Is the profile of students changing?) and **Technological** (what technological changes are in the pipeline? What methods of communications are starting to be used that you think may become more mainstream? What are the strongest and most long-term technologies you should invest in?). Write the four words onto separate sheets and stick them up around the room in the four discrete zones for discussion.
4. Divide the participants into four groups and ask each group to start at a different discussion zone.
5. Ask them to record what they think on the sheet in response to the heading - explain that they will have three minutes (or however long you think is necessary/available) at each zone. When the bell rings they have to move away from the zone they are working on to the next zone in a clockwise direction. Do this until each group has had an opportunity to record thoughts and ideas on each of the zones.

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<sup>4</sup> PEST analysis was initially developed by Professor Francis Aguilar in *Scanning the Business Environment* (1967).

### Debrief

6. Debrief by getting the participants to walk round each of the zones and generate discussion on each one. Check whether everyone agrees with what has been recorded.
7. With each sheet dig a bit further into what they have written using the questions in the box below. Use a different coloured pen to add notes to the flipchart sheets for each zone. Remember at this stage the group will be looking at the potential of the NSO.

### **C2.5: EXERCISE - Comparing SWOT and PEST**

Once you have finished both the SWOT and PEST processes it's useful to check over the findings and link the assertions made with evidence, facts and figures. Other questions to ask about them both are:

- Are there other representative bodies of youth and students that might be seen as a rival or 'competitor' - for example if the tradition in your country has been for students to link in with national political parties, will these parties feel threatened? How will you get them on board in your efforts to create an umbrella organisation?
- What is the attitude of your elected politicians to the creation of an NSO? What public statements have they made recently or in the past? Will they see your proposed organisation as a threat or an asset to civic society?
- Do you think that public opinion/media attention will have an impact? If so, what will it be?
- Will you be in competition for funds or sponsorship?

### **C2.6: EXERCISE - Developing a Vision**

It is important to develop a shared vision of what your NSO is for and how it will operate; this is a vital part of selling the initiative to the students you seek to represent. Here are some examples of vision statements from other organisations:

**Amnesty International:** Our vision is a world in which every person enjoys all of the human rights enshrined in the Universal Declaration of Human Rights and other international human rights standards.

**Oxfam:** Our vision is a just world without poverty. We envisage a world in which people can influence decisions that affect their lives, enjoy their rights, and assume their responsibilities - a world in which everyone is valued and treated equally.

**Commonwealth:** To help create and sustain a Commonwealth that is mutually respectful, resilient, peaceful and prosperous and that cherishes equality, diversity and shared values.

**European Students' Union:** Equal educational and social opportunities in an open and democratic Europe where students shape a sustainable future.

1. Circulate a range of pens, flipcharts, glue, old magazines and newspapers, postcards, etc.
2. Explain that having discussed in very practical terms what the NSO might do and how students might react to that, we have now arrived at the point where we need to develop a shared view - a vision - of why we are doing it.
3. Ask the participants in the discussion to think about and discuss what they would like to see in five years' time both in terms of the NSO itself and also, crucially, the situation of students.
4. To help us articulate this we will draw/create a vision for the NSO. With the materials provided ask the participants to create a collage or picture that summarises where the organisation and students will be in five years' time (you can extend the timeframe if you wish, or divide the participants into two groups and allocate different timeframes). They should carry out the exercise, at this stage, as if there were no financial constraints.
5. Come up with a 20-word vision statement for the organisation.
6. Allocate a period of time for the participants to complete the task.

### **Debrief**

7. Ask the group (or each group) to feed back their ideas. Generate a discussion around a proposed vision statement. Pool together recommendations from the various groups to come up with the NSO's own vision statement.

### **C2.7: EXERCISE - Developing a Mission**

Once you have agreed a vision - an overall idea of where you are going - the next stage is to develop a mission or a series of objectives that will help you on the way to achieving the agreed vision. One way of looking at this is to think of a dream holiday; something that you have always wanted to do. If your *vision* is to visit the Arctic Circle your *mission* is to arrange the logistics and travel plans to get you there. A mission will usually outline what will be done and the timescale within which it will be done.

### **Activity**

1. Ask the group to spend some time developing a mission statement - it should be as short and memorable as possible (you can divide the team into groups if this makes it easier).
2. To help them develop the sentence they could start with 'To make our Vision a reality our mission will be to.....'

### **Debrief**

3. Lead a group discussion on the statement or statements that have been generated.
4. Compare and contrast with the draft vision statement that was previously drafted and if necessary edit them both.

### **C2.8: EXERCISE - Agreeing your values**

Values are the way in which the organisation will behave while seeking to reach its Vision and carry out the Mission. How we conduct our business is a critical element in gaining support for a new NSO. We can achieve an objective but if in the process we have behaved in a bullying manner, or if we have ignored the concerns of some student groups, we may have a result but our support base going forward is much smaller. It is helpful for an organisation to have a clearly stated set of values, so that our members know what to expect and, crucially, they have a yardstick to measure us with.

1. Ask the participants to write down their own personal values onto sticky notes - what motivates them? What is important to them? How do they think students' union officers should behave?
2. Get them to put their values on the wall and then go through a clustering exercises pulling together common themes.
3. Once you have a set of themes split the participants into pairs for each theme and ask them to write an 'expectation' sentence to define what the value means to them.

### **Debrief**

4. Ask the groups to feed back on their statements and see if there is a level of consensus about them.
5. The sort of values that are helpful are that an organisation is student led, is inclusive, democratic and so on.
6. If you have access take a look at some value/behaviour statements from organisations in your own country, whether they are in the education sector or not.

## **C2.9: Long- and short-term objectives**

The active 'lifetime' of an officer is short: as long as or slightly longer than their time as a student. This can, as we will discuss, lead to issues that will impact on continuity and the overall strength and capability of the national student organisation. To help ensure that the new organisation lasts beyond the enthusiasm of those student leaders and volunteers who brought it about, a long-term plan is critical. Such a plan can also help to plan financial support and set a framework that new volunteers can fit into. The trick within student organisations is to ensure that short-term objectives of the officers involved who have stood for election to 'do something' or address an issue of concern to students dovetail into the long-term strategic objectives of the NSO.

### **C2.9.1: TUTOR TALK - Wardrobes and strategic plans**

This exercise helps to illustrate the importance of reviewing areas of work and projects in order to achieve the NSO's long term objectives.

1. Ask the participants to remind themselves of the main strategic areas of the NSO - these will be things like Representation, Welfare and Advice, Academic Affairs, Student Development and so on.
2. Take one of the themes that your group has been working on and use it as a worked example.
3. Take the group to a room with a wardrobe (it should have some empty coat hangers inside - no clothes at this stage).
4. Explain that the wardrobe represents one of the strategic areas of the NSO's strategic plan. Write the name of one of the strategic themes on a label and stick it to the wardrobe. Tell the group that it's not a very expensive wardrobe and will probably last about five years or so. Note that any strategic plan might have five or six strategic areas of work - so they have to imagine five or six wardrobes, each with a different label.
5. Then open the wardrobe door to reveal the coat hangers on a rail - you could label the coat hangers in advance to outline some of the main areas of work that will need to be carried out to help achieve the objective of the strategic theme. The coat hangers represent the regular work that needs to be done to achieve the objectives - but how it is done will vary.
6. Then put some clothes on the hangers and explain that in one year these clothes will be just what is required, but with the election of a new team they will review the clothes they have in the wardrobe (as we all do from time to time). They will decide to keep some clothes - the suit, the warm coat - but might get rid of an embarrassing t-shirt or a worn-out pullover and replace them with new clothes. This represents the different projects that

newly elected members may wish to achieve in their year of office - but they all help to achieve the overall goal.

7. Generate some discussion amongst the group on reflections they may have about linking long-term objectives to genuine student leadership year on year.

## **C2.10: Ethics in students' unions**

Nowadays it is common for members of the public to view those who are in positions of power and influence with a level of cynicism. The whole thrust of contemporary journalism creates a consensus that politicians are self-seeking and have no commitment to genuine ideas and beliefs. You may think this yourself - which you are entitled to do. The bad news is that as the potential leaders of a new organisation that will engage in political dynamics you are now in a position of power and influence and the student membership may regard you in much the same way. The membership will most probably believe the worst of you - however, if you take steps to ensure that every decision and action you take has been based within an ethical framework then not only will you be able to live with yourself but you will also be able to face your detractors with confidence.

Before taking a decision or embarking upon a course of action ask yourself the following questions.

- Is it legal?
- Does it conform to my organisation's policy?
- Is it fair?
- Could I defend the action at a meeting of my Student Parliament or General Assembly?
- How would I feel if it was published in the newspapers?
- Can I face myself and my family?

### **Is it legal?**

Does the decision break any local, national or international law? The breaking of the law should be considered not only in terms of the letter of the law but also the spirit and intention of the law. The decision should also be one where there is no discrimination against anybody.

### **Does it conform to my organisation's policy?**

Your policies will have been agreed by student members; they will have endorsed the vision, mission and values of the NSO. You will need to ensure that you act in line with these public statements.

**Is it fair?**

If we treat people fairly then they are likely to reciprocate. We need to be fair and equal in our approach to all students, student groups and other people with whom we need to develop relationships.

**Could I defend the decision at our Student Parliament or General Assembly?**

If you can't think of a good reason of why you did what you did, then you probably should not have done it. Don't confuse this with behaving according to differing political beliefs. Your opponents may fervently believe that attendance at a demonstration in favour of increased public expenditure was an outrage, but if you believe in it and are prepared to defend your belief that's fine, unless of course there is organisational policy against this idea and you spoke in an official capacity. Differences in political ideas are fine and defensible; breaking policy, mandates or just plain corruption are not.

**How would I feel if it was published in the newspapers?**

Your policies must stand up to both the whole of the student body, as well as beyond in wider society. You need to be able to confidently hold the moral high ground.

**Can I face myself and my family?**

This is probably the key question; the one which ultimately decides whether or not something is ethical. Could you go home and face your family confident that you had acted in an ethical way?

**C2.11: Stocktake**

Having carried out the exercises in Section C you should now have quite a body of ideas, awareness of potential dilemmas, potential activity and general information that can form the basis of a report that can be circulated and presented to developmental meetings for the NSO. The main contributing information that you will have collated from your discussions and meetings is summarised in Figure 2. The next stage is to write up all the information into a coherent Strategic Report that can be presented to a wider group of students' leaders and activists for their discussion and reaction. The aim is to get as many 'on board' with your project as possible.



*Figure 2: Contributing information for an NSO Strategic Report*

#### **SECTION SUMMARY**

Through engaging in the discussions and exercises in this section you have discussed the scope of what an NSO can do and developed and reflected on strategic themes. You have also examined what other organisations and stakeholders think of an NSO and analysed the future potential of your NSO, developing both a vision and mission underpinned by ethical values.

## **D: Governance and Democracy**

In this section we will examine and discuss:

- Developing democratic structures that have legitimacy
- Developing principles of democracy
- Types of democratic structures
- Attitudes and approaches to democracy
- Components of representation
- Representative tensions
- Developing effective accountability
- The public sphere theory
- Developing constitutional documents
- Running free and fair elections
- Benchmarking and quality
- The role of student engagement

### **D1: Developing democratic structures that have legitimacy**

At the developmental meetings of the NSO you will need to engage the potential membership in discussing and agreeing how your democratic structures will work. In this section, you will find some discussions and exercises that are designed to generate ideas on creating a legitimate democratic structure that will suit your situation. As a first step it is worth discussing and agreeing a range of 'principles of democracy' to help the development group, and then the wider membership, get on to the same page.

#### **D1.1: Developing principles of democracy**

The statements and suggestions relating to developing principles of democracy listed below are based on a recent democracy and governance review undertaken by the National Union of Students in the United Kingdom.

1. The organisation should draw up a statement on who the constituent members are; so for example if you have decided that the best way forward is to have students' unions as the constituent members, then this needs to be clearly stated and agreed
2. There should be a statement that explains the relationship of students with the NSO, particularly if you have agreed that the students' union is a constituent member. If you have decided that the relationship is an individual one, then you need to develop a slightly different statement.

3. There should be an acknowledgement that any democratic decisions within the NSO should be made by its membership; these decisions are related to working out what is in the interests of students to do or think.
4. The membership (as defined) should feel represented when decisions are being made. However, it will need to be recognised that any decision will not necessarily represent the views of everyone, as not everyone will agree. So it is the *decision-making process* that should be representative, not necessarily the decision(s) it produces.
5. Similarly the NSO and its elected leaders should not, and cannot, claim to represent everyone; nor can they singularly embody the diverse characteristics and perspectives of all their members or the wider student body.
6. The NSO and its elected leaders should act in the interest of the membership and harness their collective power to achieve it. The membership should then hold the elected leaders to account for their actions.
7. The primary role of elected officers within an NSO is to lead the organisation in achieving its goals. Their work should therefore focus on how to secure these demands.
8. Democratic decisions should be conducted using processes that maximise the principles of inclusiveness, popular control, transparency and considered judgement.
9. Any democratic system that is designed has to be based on the location and connections between the memberships. If it is not feasible to get all student representatives into one room or location, then other federal structures need to be considered. Where possible agreed use of communications technology should contribute to the democratic process; student organisations need to be as innovative as possible.
10. If the local democratic structures in a students' union do not work, then this can compromise the democratic legitimacy of the NSO. Therefore, its needs to be agreed that a key part of the NSO's role is providing guidance and support to their members in developing effective representative structures.
11. Any structures need to acknowledge the need to engage and involve minority communities, regions and groups of students, and where appropriate allow them a level of autonomy to define their own agenda.
12. The linguistics of democracy and decision-making need to be understandable and accessible to all members; for example, some constitutional documents still use Latin references that find their origins in a country's legal systems. It's better to use a phrase that everyone gets - including the lawyers! A key part of an NSO's objectives might, in the long term, include ensuring that there are youth/student-friendly versions of laws and conventions governing education in their country.
13. There should be total clarity over what decisions are made; where, why and who is accountable for the decision being implemented.

## D1.2: EXERCISE - What are our principles of democracy?

Using the draft principles developed by NUSUK and evaluated by the Advisory Board (selected from each region of the Commonwealth) for the Project, the group should now develop their own list of principles and use the opportunity to discuss which areas are more important than others.

### Activity

1. Circulate the NUSUK Principles of Democracy shown in D1.1 and ask the participants to read them.
2. Divide the group into pairs and ask each pair to develop their own set of democratic principles - tell them how long they have for the exercise.

### Debrief

3. Ask each pair/group to feed back on the principles they see as important; generate a debate around any differences of opinion.
4. Talk the group through creating a draft set of principles that can be circulated to the potential membership.
5. Capture the key points and finish the session.

## D1.3: EXERCISE - Attitudes to democracy

Democracy is not a uniform system; there are a great variety of approaches in terms of who takes part, who has the vote, and how those votes are counted. The important aspect is that the membership within an NSO agree and have confidence in the system that is chosen, and that the decisions reached and the point of view the body represents to national decision-makers has to be beyond reproach; it has to be legitimate based on deeply held and deeply felt student opinion. In this exercise, we will examine different approaches to democracy.

1. Five different democratic models are described below: The **Activist**, **Consumerist**, **Conflict**, **Consensus** and **Participative** models. Ask the group to read the descriptions of each model and discuss each of them. For each type give a score out of ten in terms of how far you think the model would be a good one for your NSO.
2. Explain that they can give a positive or a negative score ranging from -5: 'No way are we like that' to +5, 'Yes - you couldn't have described us better'.
3. Tell them how long they have for the discussion and ask them to come up with some examples of how the model might work in practice.

### **Activist model**

Democracy is a part of the political process. It is not a passive process and people should make their own decisions through their active involvement in some sort of issue (e.g. a campaign). Activist democracy needs to have a clear leadership who are quickly accountable to the rank and file; it does not have high regard for formal structures and to be effective it relies heavily on spontaneity.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

*Your score and example:*

### **Consumerist model**

Most people only get involved if they are unhappy with what is happening. People only attend meetings and actively participate in an organisation's politics and decision-making if the organisation isn't working well. If, on the other hand, everything works well, and everyone is probably happy with the leadership, there is no real motivation to get involved; for example, shareholders rarely attend the annual general meeting of companies if the company is doing well and making a profit. In many respects apathy can end up being the product of a well-run organisation. Formal structures are important to consumerism and if things go wrong people should be able to get involved and put the organisation back on the 'right tracks'.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

*Your score and example:*

### **Conflict model**

For a democratic organisation to be lively, active and participatory it depends upon the 'dynamic' of disagreement, argument and debate. Conflict is healthy if it stops the leadership of an organisation from becoming complacent. Organised conflict, e.g. through caucuses etc., helps to maintain the accountability of leadership and at the end of the day the well-being of the organisation.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

*Your score and example:*

### **Consensus model**

For an organisation to work and be effective it is necessary that it adopts policies and plans that everyone can support. The role of the leadership of the organisation is to work towards the lowest common denominator and filter out disagreements, clashes and conflict by putting forward positions and strategies which it feels everyone should be able to give general support to.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

*Your score and example:*

## Participative model

Democracy is all about giving people the power and the right to make decisions which affect them. Central to participative democracy is the view that decisions are best made by the people most affected by them rather than by remote bodies. Decision-making forums should be accessible, decentralised and flexible; the role of the leadership is to encourage people to participate in making decisions and co-ordinate the whole process.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

*Your score and example:*

## Debrief

1. Talk through each of the models using the notes below.
2. Put up signs around the room representing each of the models. Based on their own thinking ask the participants to stand by the model that they think suits them the best and ask them to outline why. If there are participants standing at different stations then generate a debate.
3. To vary the discussion ask them to stand by the model that best describes their own student organisation at the moment and again generate debate around it
4. Try and reach a conclusion about the type of model that is felt to provide the future NSO with the best opportunity.

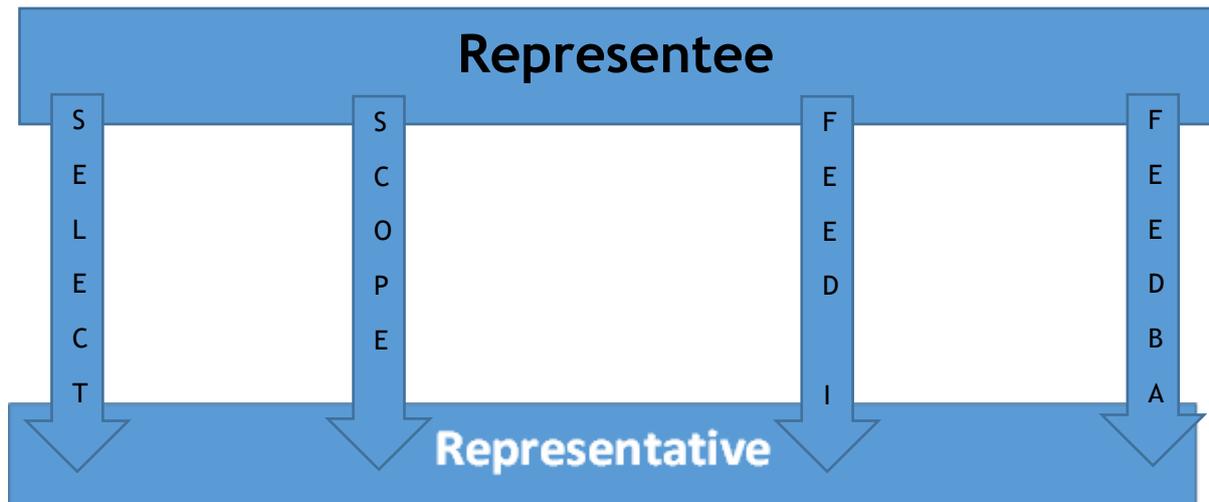
Of course the key point relating to these different ways of describing democratic engagement is that at different points and in a range of circumstances 'democracies' will utilise all of the methods depending on the needs and requirements of the moment.

## **D1.4: Types of representation<sup>5</sup>**

The purpose of strong democratic structures that enable students to participate and make their voice heard is to inform student representatives. Representation refers to the process whereby one person or a group of people have been chosen to act, speak or be present on behalf of another person or group of people. The link between the representative and those being represented is made up of four components, as shown in Figure 3.

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<sup>5</sup> Ideas adapted from a Handbook for the Regional Action and Involvement South East (RAISE)



*Figure 3: The four aspects of representation*

**Selection:** How do those who are being represented choose another to stand in for them? What powers do they have to dismiss them and choose a different one?

**Scope:** What is the context of this piece of representation? What is the capacity in which the representative will be working? And, how far can they act on their own initiative?

**Feed-In:** How has the representative acquired a knowledge of the issues affecting those they represent? How well do they understand the representees' point of view?

**Feedback:** How will the representative inform the representee about what has been happening? How is the representative held accountable for what they do?

### D1.5: EXERCISE - Components of representation

#### Activity

1. Share Figure 3 above, along with the definitions of each aspect of representation.
2. Ask the group to consider and discuss what structures might need to be put in place to develop your own democratic structures.

#### Debrief

3. Ask the group to give feedback on what they discussed and then generate a discussion on what structures might be needed or how you can develop the structures that you have.
4. In particular discuss how new technology and social media can be usefully engaged.

## D1.6: Representative tensions

The role of the representative can be subject to various tensions which will require some skilful handling if the representative is not to become overwhelmed!

Approach	One Aspect	Another Aspect
<b>Leadership versus Representation</b> - this is an issue that hopefully you have resolved in discussing the scope of the representative task	The leader may see fit to influence those that they represent to acknowledge their present viewpoints but to drive on to help reach a future vision	The 'pure' representative will wish to speak accurately on behalf of those they represent, without distortion, and will feed back to them impartially
Autonomy versus Representation	The representative may wish to speak with their own voice	The 'pure' representative will wish to speak accurately on behalf of those that they represent without distortion and will feed back to them impartially. The resolution to this dilemma follows the same steps as the previous approach - except that in this case the representative is speaking in their own right rather than as a leader with an appropriate qualifying phrase - 'speaking personally...'
<b>Representing conflicting interests</b>	The representative has a duty to those that they represent	The representative may also be linked with other initiatives that come into conflict with this. Do you represent the wider student body or those that elected you? Or your own political viewpoint?
<b>A foot in both camps</b>	The students being represented carry on with their everyday business	The representative will be meeting those who have influence or who are in power - they need to guard against being 'sucked in' to the influential group. This can be very seductive, especially if the representative has aspirations to enter politics.
<b>Respecting group decisions</b>	There will be decisions made by the group of which the representative is a member	The representative may not agree with these decisions but has a duty to represent the view that has prevailed.
<b>Representing diversity</b>	It is often felt that strength lies in presenting a united front. We should reveal weakness!	The representee, especially when it is a large diverse group, may not have a united front.

### D1.7: Developing effective accountability

The NSO will be a complex organisation, and in running complex membership organisations there are a couple of ways of looking at the governance. On the one hand we can look at accountability and control or we can look at democracy and collectivism. These approaches indicate that there are two differing, sometimes conflicting, rationalities at play as the basis for decision-making in your NSO. This means that when you do something you can justify it as a representative (politician) or as an administrator or manager. To use an example, for and against the use of national identity cards:

ADMINISTRATIVE = we believe that they could never be fully secure POLITICAL = we believe it would impinge too much on our civil liberties
--

<b>Administrative rationality</b> ‘is the design of an organisation in such a way that specified tasks or outcomes are attained with certainty or economy. These conditions appear in many instances to require a routinisation of operations, specialisation of functions, directness of communication, and speed in decision-making <sup>6</sup> .’	<b>Political rationality</b> ‘is a flexibility of operations to suit the needs of different membership groups located within different working situations, a duplication of functions in order to build checks and balances into union control, a multiplicity of communications in order to allow maximum interchange ... of opinion, and a holding back of decision-making until every viewpoint has been expressed <sup>7</sup> .’
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These occasionally conflicting approaches mean that we need to develop clear structures for student members to make their voice heard. The government of your country will have a range of structures, checks and balances. An NSO needs to do the same.

An important point to discuss is the **extent to which student leaders are engaged in politics**. A view is sometimes taken by government ministers, the education sector and indeed students themselves that student leaders need to be separate from that process. Given that we hope engagement in the NSO will help future leaders develop a sense of civic leadership and responsibility, then it seems wrong to restrict them from engaging as soon as they can in the political dynamics of a country. However, like any leader, they need to respect the will of their members and so if the structures are right then the policy outcome should be acceptable. It is very difficult

<sup>6</sup> Child, J., Loveridge, R., and Warner, M., 1973. “Towards an Organizational Study of Trade Union”

<sup>7</sup> Child, J., Loveridge, R., and Warner, M., 1973. “Towards an Organizational Study of Trade Union”

to avoid politics altogether because many of the policies that impact students' lives have come about through a political position - whether or not to provide state-sponsored support, whether to charge tuition fees, and so on. Where difficulties come about is when an NSO allies itself closely with or another of the political parties, possibly in opposition to the government of the day. The trick is to engage with all parties and make the case for what the organisation has agreed is the best for students. In Section B we looked at the diversity of our membership and tried to identify who they were.

A useful way to develop this discussion is to adapt the 'Public Sphere' model developed by the philosopher Jurgen Habermas in his book *The Structural Transformation of the Public Sphere* (1962). Habermas defines the public sphere as: 'A virtual or imaginary community made up of private people gathered together as a public, which does not necessarily exist in any identifiable space.' And he notes that 'through acts of assembly and dialogue, the public sphere generates opinions and attitudes that serve to guide the conduct of public affairs'. His idea suggests that there are five conditions for a membership organisation that is engaged in making democratic or collective decisions to do so legitimately:

- Access of the members to the organisation structures must be made as close as possible.
- There must be a high level of autonomy to ensure that the members are not subject to coercion.
- Each member must participate on an equal footing, disregarding levels of hierarchy in the public sphere.
- There must be clear rules so that students know when to engage.
- Student members must be able to make meaningful contributions.

So, in short, political dynamics within an NSO is all about the diversity of members and the structures through which the members interact, so as to generate a localised sense of 'public opinion'.



*Figure 4: The Public Sphere model*

- The **sociological sphere** represents the myriad different kinds of students meeting together and discussing their experiences and feeding into the structural sphere through their students' unions.
- The **structural sphere** contains the committees, meetings and points of engagement that help an NSO.
- The **NSO sphere** is the conceptual core of the student community and it is surrounded by the structures through which collective opinion to be represented is formed.

The model suggests that various external factors will impact on the student community: a change in government policy, for example, or a new sector initiative impacts upon the membership who discuss it through their students' unions (who themselves will have a similar public sphere) and the interactive structures available to them. This in turn creates a sense of collective public opinion for the NSO to articulate. There is a danger, of course, that the individuals and groups in the sociological sphere do not have structures or are unable to access the structures that enable them to get their view and opinions across. The leadership of the NSO sphere have to pay particular attention to this and constantly evaluate how they are rooting their public statements in the legitimate views of students. The role of the NSO leadership becomes one of facilitating the shared expression of public opinion of the students in their member organisations, in much the same way as a local students' union leader will be doing with the union members.

#### **D1.8: EXERCISE - Evaluating the public sphere**

1. Introduce and explain the Public Sphere model to the group
2. Check that they understand the model then pose the following questions for discussion:
  - a. Do they think it is a useful tool for discussing and analysing student representatives and politics?
  - b. What are the strengths and weaknesses of the model?
  - c. How could they apply it to your situation?

### Debrief

3. Generate discussion around the answers to the question.
4. Draw out any relevant lessons for the development of your NSO.

## **D2: Rules and regulations**

The overall rules and regulations of your NSO will need to be linked in some way to the legal requirements and registration expectations of your own country. The report *The State of Student Governance in the Commonwealth* (Day and Maxwell-Stuart, 2016) showed that 58 per cent of student organisations in Commonwealth countries had their existence recognised in some way in national legislation. There was some variation: in African countries the figure was 85 per cent whilst in the Caribbean and Americas region it was only 45 per cent. The various legal forms were:

- Non-governmental organisations (NGO) - 51 per cent; this is by far the most common legal form.
- Government department - 22 per cent; this can be a useful arrangement as an NSO starts to grow but in the long term close association with government in this way (no matter how well meaning) can compromise the perceived independence of the NSO.
- Part of a political party - this applied to student wings of political parties. Association in this way does not allow for student leaders to speak on behalf of students, just those who are members of that party.
- Charitable organisations - this was mainly the case in Europe and any rules and regulations will need to be mindful of the expectations and requirements of charities. Most charity regulation will limit the level of political campaigning and lobbying to the main beneficiary group, in this case students.
- Independent organisations with ties to specific universities - 20 per cent; mainly prevalent in smaller countries with only one HE institution (HEI), acting as the students' union and national voice at one and the same time.
- University department - as above but with less autonomy.

As discussed above, for students' unions to be able to contribute effectively to democratic decision-making there needs to be a set of accessible constitutional

documents that enable them to participate on a level playing field. The next few sections examine how these might be developed.

## **D2.1: Developing a working set of constitutional documents**

A set of rules, a constitution or some form of governing document is a vital element in creating any NSO. The members of the organisation need to know when, where and how they can provide input into debates about NSO activity and the policy position the NSO might collectively agree. While some may find rules and regulations to be frustrating at times, they are a mechanism whereby everyone can have equal access to decision-making (rather than relying on the loudest voice) because there are very clear, established procedures. There is, of course, a danger in that individual delegates may be, or at least appear to be, more knowledgeable about the rules than others and utilise those rules to secure their objectives. It is vital that an NSO runs briefing and training events for delegates to decision-making events so that everyone feels able to participate.

A constitution will usually be a legal document (depending on the legal form an NSO has adopted) which outlines the activities and the procedures of the NSO. A draft constitution will usually be presented at the first/inaugural meeting of the NSO for delegates to discuss and amend as they see fit. To get to this point, once it has been established that there is a will amongst students to create an NSO then a small steering committee might be established to develop a draft set of rules. It is important that such a committee is seen to have a broad level of representation and is not restricted to one institution (or school if there is only one institution in a country), gender or community. The broader the group the more the likelihood that there will be widespread support for the initiative.

Some important areas to be covered in a constitution include:

- What is the name of the organisation?
- What are the aims and objectives of the organisation?
- Who are the members of the organisation?
- How will meetings be organised? Which is the sovereign body? How frequently will that body meet?
- Do you need provision for emergency or extraordinary meetings?
- What is the quorum (the minimum number of representatives required) for any of your constitutional meetings?
- Who will constitute the leadership of the organisation? Will there be an executive committee? What elected officers do you need?
- Rules governing elections: eligibility, tenure in office, nomination and voting procedures.
- Will there be any sub-committees to carry out specific tasks - for example Finance?

- Where and how will minutes of your meetings be posted?
- How can members amend the constitution if they need to?
- How will funding of the organisation be garnered and managed?

## D2.2: Running free and fair elections

In this section we will look at how you can go about organising the first elections for the NSO and then go on to look at options for election rules and regulations that will suit the new NSO in the longer term. Student organisations have proved over the years to be highly democratic bodies and the experience of standing for position, campaigning to get support, winning and (crucially) losing is a key experiential building block for wider civic society.

The development of election regulations will form part of the process of preparing a draft constitution, the details of which usually form some sort of schedule or annex to the core constitution. The range of issues that need to be resolved by any set of election regulations are:

- Appointing a Returning Officer or someone to supervise the election process
- Publishing and promoting the elections and the opportunity to serve
- The timing and location of elections
- Eligibility to stand
- The process of nomination and becoming a candidate
- Rules relating to candidate publicity and its production
- Procedures for meetings of candidates and hustings
- Where, when and how to vote
- Counting regulations and your chosen voting system
- Dealing with complaints and appeals
- Arrangement for postal or online voting
- Rules relating the by-elections if they are needed (if someone resigns or no one is nominated within an agreed timeframe).

The **Returning Officer** has the job of making sure that any election is run in a free and fair manner, in line with election regulations agreed by the membership through their democratic structures. They will also have the responsibility (possibly supported by an elections committee or a set of Deputy Returning Officers) on any disputes that arise during the election process. The role of the Returning Officer is pivotal in ensuring confidence in the outcome of your elections. So, it is important that you choose a Returning Officer who is beyond reproach and someone who is not perceived as having any vested interest in the outcome of any election they supervise. The development group can probably be involved in choosing someone to take on the role. They could choose from such people as ex-civil servants, senior

academics or lawyers, or if there is an organisation responsible for election probity in your country a representative from that organisation may be appropriate. It is good practice for anyone appointed to be proposed and endorsed by the membership if that is at all possible. The Returning Officer can then, if they wish, choose some assistants, taking care to ensure a gender balance/balance of a country's communities.

The first task of the Returning Officer is to draw up an **election timetable** so that everyone is clear when, where and how the process will take place. The key dates that will need to be agreed are:

- Notice of election
- Circulation of materials that promote both the positions up for election and the overall process itself
- Clear date for the opening of nominations
- Clear date for the closing of nominations - at this point the election is usually deemed to have started
- Dates for any candidate meetings or hustings
- When the voting process starts and concludes
- When and where the votes will be counted
- When the results will be announced.

As well as promoting the important dates that are linked to the rules and regulations for elections, the Returning Officers and their team will need to oversee and circulate materials that **publicise and promote the elections**. Access to information about the process and the available positions is a key factor in attracting a number of high-quality candidates. Contested elections should be a sign of a healthy organisation and if candidates campaign in a respectful way the whole process can be a positive advert for the new NSO. The reverse, of course, is also true and having a Returning Officer who can deal quickly with disputes is crucial. The sort of information it is helpful to circulate is:

- Why the election is taking place - and as the first elections for your new NSO it should also explain the vision and purpose of the new organisation
- What positions are available and how they can help to develop a new organisation
- How long the period of office or mandate will last
- What allowances, expenses or recompense if any will be available to the post holder
- What training and support the successful post holder can expect to receive
- When the election is taking place - an outline of all the key dates

- What a candidate will be expected to do - and by when - during the election campaign
- How the process of campaigning and holding office can both help to develop key employability skills for the candidate.

As part of the publicity process you might want to issue an 'Opportunity Profile' for each of the available positions (see Section J 'Capacity Building for the NSO' on volunteer management). It can be helpful to issue all this information alongside election regulations, either in booklet form or on a designated election website. These materials should also contain a nomination form. It would be helpful to ensure that there is a named promoter of the NSO elections in each university college in country. Especially in these initial stages of the organisation, the process itself can be a great advertisement for the NSO and its potential. It is also worth approaching university or college authorities (and the wider education sector) to discuss what they can do to promote the elections as whole.

**Nomination forms** need to be clearly and widely available, preferably online with a linked in-line system for submitting nominations. The Returning Officer has the role of checking that each nominated candidate meets the eligibility criteria agreed in the election regulations. The form itself needs to include the following information:

- Name of Post
- Name of Candidate with contact details so the Returning Officer can get hold of them quickly if need be.
- Student status (if you require a candidate to be a matriculated student) - this is usually linked to a 'declaration' that the candidate meets the criteria and is willing to stand for and serve in the advertised position.
- Proposed and seconded by - again the election regulations will outline how many nominators are required. For national organisations it is usual to demonstrate support from across the membership, for example nominations from at least three different students' unions, regions of country - much will depend on your agreed membership model.
- Signatures of the candidate and nominators
- Who to submit the nomination to and when by - this should be linked to a clear statement that nominations will NOT be accepted after a certain time/date.

It is common practice for candidates to submit a **manifesto** at the same time as their nomination form outlining why they want to stand and what they hope to do if they win the election. The Returning Officer will need to check the text against any rules and regulations that have been agreed. Depending on what has been agreed then the Returning Officer will arrange for the printing and circulation of the manifestos to the voting membership. Manifestos are usually limited to a set amount of space

and text to help create an equal playing field for the candidates concerned. It is also helpful to hold a **candidates' meeting** at the close of nominations. This can either be held in one location or via Skype or some other online conferencing program. The meeting can help to make sure that all candidates are clear on the rules and clear on how the Returning Officer may deal with breaches of the rules. It sets an important tone for the election. It also gives candidates the opportunity to clarify regulations and ask any questions that they may have. If your election regulations contain limits or conditions on election materials produced by candidates then this meeting is a good opportunity to check that the materials are OK, meet with the rules and crucially that ALL candidates understand the publicity rules.

One particular area that can cause confusion and acrimony is the issue of **election publicity**: what candidates can or cannot do. In an ideal world there would be as few rules as possible and all candidates would be able to demonstrate the organisational abilities and their creativity by producing imaginative publicity. In reality there needs to be some form of constraint to restrain those with significant personal (or students' union) resources behind them. You can deal with this by setting a budget for each candidate, although even then individuals may have connections that allow them to produce greater numbers or higher-quality materials for a cheaper price. The way in which candidates can campaign changes all the time, especially with developments in new technology and social media, so it's best to keep regulations relating to publicity as simple and flexible as possible. The Returning Officer must make it clear to candidates what will be tolerated and what could result in disqualification. Some candidates may seek to focus on alleged breaches of the election regulations, especially if the election is seen as tight. The best response is to tell them to 'stop complaining and start campaigning'.

The Returning Officer or one of their team, or a nominated person in a university or college, will be responsible for organising **candidate meetings** at which candidates can get their message across and be open to questions from voters. It may not be possible to get all candidates in one room at one time, so online solutions may help. Candidates can record messages on YouTube and these can be accessed from a central elections hub. You can also build in a Q&A function so students can ask questions of the candidates.

The Returning Officer's team will also be responsible for encouraging as **wide a vote** as possible. Much will depend on whether you are holding elections as part of a general (inaugural) conference with voting delegates present in the room or whether you can develop an online voting system. The former is usually a feature of NSOs that have opted for a more federal/confederal representative democracy model, while the latter lends itself more to individual student membership of an NSO. The greater the percentage of the membership voting the stronger the credibility of the elected representatives. If you are using an online voting system, then that system

needs to command the confidence of the electorate. This is why an independent Returning Officer is so important. If you are using **ballot boxes** then they need to be staffed by people who can be seen as neutral to the process overall. The boxes themselves should be open for a specific period of time and this should be well advertised and announced if you are at a conference. If you are using boxes the locations need to be clearly marked, with a 'zone' within which voters are free from any election canvassing. The boxes should never be left un-staffed at any point. Those staffing the ballot boxes need to have some clearly visible credentials and/or a t-shirt indicating that they are an election official.

The Returning Officer and their team will also be responsible for either making sure the online voting system is foolproof and/or **issuing ballot papers** to voting delegates. Again, this process can cause some tension if it is not dealt with in a meticulous and organised fashion. Ballot papers should only be issued to accredited delegates to a conference/meeting as defined by the constitution or the agreed rules for that meeting. Voters need to sign a declaration that they have received their ballot forms. Needless to say you need more than one person on the ballot issuing desk. The final phases are the organisation of the count and the election announcement themselves. The mechanics of counting will be determined by whatever election system you have decided to adopt (see below); however, there are some core principles for the organisation of a free and fair count.

- Observers should be welcome, but they must be asked to be as silent as possible, speaking only if they need to raise an issue of concern relating to the vote. You can decide to limit the number of observers to one per candidate.
- Any questions that an observer might have must be channelled via the Returning Officer.
- Once an observer has entered the count they should not be allowed to leave. It is also helpful to ask them not to use mobile devices during the count process as it is only fair that candidates (who are not present at the count) learn about the results through the proper channels.
- Any request for a re-count should be addressed to the Returning Officer. Guidelines for this should also be developed and added to the appendix.
- The Returning Officer will keep observers and counting staff informed about what they are doing at each stage of the process.
- Ambiguous ballot papers will be judged by the Returning Officer (whose decision is final) but they will explain their rationale to the observers present.
- Counters should have enough space to operate and should not move on to a subsequent stage of a count until told to do so by the Returning Officer.
- The ballot boxes should be opened in front of the observers and counters, ballots then emptied onto the table - check that none have fallen on the floor.

- The count should be taken slowly. Speed can result in mistakes, and mistakes then dent the credibility of the process.

The final duty of the Returning Officer is then to **declare the results**. It can be helpful to call candidates together before the formal announcement to tell them the results so they can prepare themselves for a victory or concession speech - or at very least get over the emotion of it all before having to appear again in public. Once the results have been announced that is the end of the process and no subsequent complaints should be allowed; the Returning Officer's decision has to be final. The successful candidates need to know:

- When their term of office officially starts and when it will conclude
- Dates of any meetings that are coming up that they will be required to attend
- Dates for any briefings and training events

Successful candidates should also be given:

- A copy of any formal documents outlining their job
- A copy of any regulations relating to the organisation.

In the long term consideration might be given to the introduction of **online voting**. However it can take up a significant amount of resource and the system needs to be one that is trusted by the voters. Any online system (as with the paper version) needs a way to ensure that a voter's identity can be verified, that the vote they cast will be anonymous and that there is no possibility of casting more than one vote in an election. For smaller NSOs that may be associated with one HEI then the students' union/NSO can investigate the feasibility of a partnership with the HEI to develop a credible online system. For larger NSOs covering campuses it is more of a long-term aspiration than a move that is recommended from the outset.

As a final point it is recommended that a voting system is adopted that balances fairness with familiarity. There are a variety of systems that can be used - first past the post, single transferable vote, alternative transferable vote, Borda count and so on. It is recommended that in the initial stages election processes are kept as simple as possible - as time develops new variations such as reserved places for targeted groups of students, or gender balancing, can be introduced but these initiatives are rightly the sort of debates about the future of the organisation that we hope that members of the NSO will engage in!

### **D2.3: Electing a steering committee/development group**

We have already identified that in the early stages of an NSO you will need to elect or find individuals who are prepared to put the work in and steer the overall process

to allow the inaugural meeting of the NSO and the agreement of any constitutional and legal documents. Initially, such individuals may well have been selected or self-selected to get the process to a point where an overall timescale and plan can be agreed. At point in this process there will need to be a meeting of membership representatives and it is at this point that it is advisable to elect a broad cross-representative group from the membership.

### **D3: Benchmarking and quality**

The report on *The State of Student Governance in the Commonwealth* (Day and Maxwell-Stuart, 2016) recommended that the Commonwealth Students' Association work with its member organisations to establish a development framework for NSOs which is underpinned by a set of guiding principles. It was suggested that the framework be designed to provide a practical tool to support organisational development for NSOs. The framework, it is hoped, could also help to enable Ministries of Education to understand the positive role that students' unions and NSOs can play and encourage them to support their growth. Such operating principles, guiding development frameworks and quality marks are not alien concepts to student organisations; some suggested examples follow.

It is proposed that a benchmark tool be created to assess and develop NSOs and students' unions in the Commonwealth. A similar tool has been developed by NUSUK. In 2013, NUSUK launched a new quality framework (Quality Students' Unions) to assure the quality, standards and overall effectiveness of their member student organisations. This quality mark works as a single management tool that interlocks with, and complements, relevant standards and codes that already exist within the student movement as well as the charitable and education sectors. To meet the minimum standards and be considered an accredited students' organisation, an organisation will need to be compliant with both its statutory obligations and accepted best practice. Self-evaluation drives self-reflection and planning, which are both fundamental parts of the annual cycle of every organisation. As a result, the quality mark will become an intrinsic part of a union's annual cycle rather than an 'add on'. Quality Students' Unions measures the performance of the student organisation in relation to the three core areas shown in Figure 5.



*Figure 5: Three core areas of a student organisation's performance*

- **Governance, leadership and management:** How the organisation manages, plans, controls and monitors its activities. Threshold standards are set in line with good practice and statutory requirements that will not vary greatly from one union to another.
- **Activities:** How well the organisation does what it sets out to do. How well the organisation aligns its activities to the needs of its members and how effective these activities are.
- **Outcomes:** The positive impacts that the organisation has on its members.

Critically, these core areas are interdependent. For example a student organisation that has very strong governance, leadership and management and very strong activities will invariably have very strong outcomes. Performance in any two of the core areas will essentially predict the performance in the third. This interdependency should enable these three core areas to be used by unions to effectively and accurately analyse their own performance and for them to be accredited with a high level of confidence. Each of these core areas is further broken down into a series of components, which detail different aspects of a successful student organisation:

#### Governance, leadership and management

- Strategic planning
- Relationships and partnerships
- Governance
- Democracy
- People

#### Activities

- Communication
- Services
- Participation
- Representation and campaigning

## Outcomes

- Review and evaluation
- Context

Further details and examples can be found at: *NUSUK Quality Students' Unions*, <http://qualitystudentsunions.org.uk/> 2013

In 2008 The European Students' Union (ESU) published a *Students' Union Development Handbook*, part of a process of building a stronger student movement. This document focused on the role and function of the student movement at an international level. ESU argued that student organisations are more closely akin to social movements than NGOs and used this as a basis to offer and suggest a range of areas where students' organisations both locally and nationally could learn from each other in order to be more effective. The work was underpinned by four key pillars of the student movement: representativeness, openness, democracy and independence.

- **Representativeness:** This was defined as the measure in which the student movement bodies reflect the formal characteristics of the student population and is derived mainly from formal structural and political organisations. Indicators include: total numbers of students involved in electoral process, regional balance of participation, institutional type balance
- **Openness:** ESU considered accessibility of students' organisations as critical to the maintenance of an effective, powerful and legitimate student movement. Accessibility in terms of socio-economic background, race, sexual or political orientation, gender, and religious belief were all identified as key. ESU also argued that formal equality is unlikely to be sufficient and that often empowerment policies play an important role in ensuring accessibility and openness.
- **Democracy:** ESU also argued that both elections and decision-making processes indicate democracy. They expressed the view that regardless of structure students' organisations must be grounded in the popular vote. ESU identified the importance of pluralism in decision-making, accountability and active student participation.
- **Independence:** ESU defined this pillar as 'the absence of mainstreaming influence in representation and the democratic processes'. While it's clear that the students' organisations operate within the academic community, elections and democratic processes must be carried out with no interference from the authorities in order that unions can legitimately participate through their own chosen representatives. ESU highlights that regulations endorsing independent student elections contribute heavily to the successful 'independent role' of unions.

### D3.1: The role of student engagement

Students' unions and NSOs are just one aspect of effective student engagement. Focusing on a single definition can be difficult as such engagement may well change from context to context. A good example of an integrated approach to student engagement across all sectors involved in tertiary education can be found in the work carried out by 'sparqs' - student partnerships in quality Scotland. Sector agencies in Scotland have worked together to develop a national agreed *Student Engagement Framework for Scotland*, which consists of five key elements and six features. The five key elements are:

- Students feeling part of a supportive institution - this element of engagement includes the range of activities and approaches that encourage students to come to, feel part of, feel supported by and participate in the institution.
- Students engaging in their own learning - this element is about supporting students to shape their own experiences and the outcomes they want to achieve. It is about encouraging students to be active partners in the learning process by providing effective learning and skills development opportunities.
- Students working with their institution in shaping the direction of their learning - this element of engagement relates to the ways in which students can comment on their learning experiences either individually or as a group. It builds on the idea of students working in partnership with academics and other staff at the subject level to bring about enhancements in their learning experiences
- Formal mechanisms for quality and governance - this element focuses on formal engagement with institutions through representative structures and processes operated primarily by students' associations (students' unions). It is about ensuring that student representatives can work in partnership with the institution to enhance the student experience at a strategic level.
- Influencing the student experience at a national level - this element of engagement relates to the opportunities students have to shape the development of education policy at a national level, working with others to contribute to the success of the sector as a whole.

All of these elements rely on six features that need to be developed, as follows. There needs to be a **culture of engagement** - a willingness on all sides to work in partnership wherever possible, recognising that from time to time partners will take different perspectives on issues. Students need to be seen as **partners**. The **student contribution needs to be valued**, there has to be focus on **enhancement and change**, effective responses to supporting and creating **diversity** and appropriate **resources** and support allocated. It is recommended that you consult the resources and materials on the sparqs website. <http://www.sparqs.ac.uk/>

An effective student engagement strategy within institutions can enhance the ability of a new NSO to find legitimate ways in which to reach students and listen to their

needs and concerns, usually through an effective class, course or faculty representatives (see Exercise H4.2 - Developing a partnership approach).

### D3.2: The ladder of participation

The ladder of participation was developed by Sherry R. Arnstein<sup>8</sup> as a way of analysing active citizen involvement in politics and the local community. She sees it as a ladder that is 'climbed', with non-participative approaches on the bottom rung. You can use this as an additional discussion tool when talking about the nature of democratic structures.



*Figure 6: The ladder of participation*

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<sup>8</sup> Arnstein, Sherry R. 'A Ladder of Citizen Participation,' JAIP, Vol. 35, No. 4, July 1969, pp. 216-224. See also: <https://lithgow-schmidt.dk/sherry-arnstein/ladder-of-citizen-participation.html>

**1 Manipulation and 2 Therapy.** Both are non-participative. The aim is to cure or educate the participants. The proposed plan is best and the job of participation is to achieve public support by public relations.

**3 Informing.** A most important first step to legitimate participation. But too frequently the emphasis is on a one-way flow of information. No channel for feedback.

**4 Consultation.** Again, this is a legitimate step - attitude surveys, neighbourhood meetings and public enquiries. But Arnstein still feels this is just a window dressing ritual.

**5 Placation.** For example, co-option of hand-picked 'worthies' on to committees. It allows citizens to advise or plan ad infinitum but retains for power holders the right to judge the legitimacy or feasibility of the advice.

**6 Partnership.** Power is in fact redistributed through negotiation between citizens and power holders. Planning and decision-making responsibilities are shared, e.g. through joint committees.

**7 Delegated power.** Citizens holding a clear majority of seats on committees with delegated powers to make decisions. Public now has the power to assure accountability of the programme to them.

**8 Citizen control.** Have-nots handle the entire job of planning, policy-making and managing a programme, e.g. neighbourhood corporation with no intermediaries between it and the source of funds.

#### **SECTION SUMMARY**

Through engaging in the discussions and exercises in this section you have considered and evaluated democratic structures that have legitimacy, as well as developing ideas around principles of democracy and types of democratic structures, attitudes and approaches to democracy. You will have discussed components of representation and some of the typical tensions that can arise and discussed appropriate ways of developing effective accountability. You will have applied the Public Sphere theory to your NSO and summarised ways of developing constitutional documents. You will have learned about the importance of accessibility, identified ways to run free and fair elections, evaluated some benchmarking and quality approaches and, finally, evaluated the role of student engagement.

## E: Finance, funding and infrastructure

Finance is, of course, fundamental to the effective operation of an NSO. Its members can have many plans and ideas on how to make student lives better, but without an adequate source of finance the activities will be limited. In section we will look at:

- Options and approaches to funding models
- Developing a budget and managing finances and assets
- Developing a funding submission
- Tips on negotiating and rehearsing arguments in favour of an NSO

### E1: Options for funding models

The European Students' Union (ESU) have identified two key sources of funds that they describe as:

*Internal funds* (raised from students and student organisations) and  
*External funds* (resources raised from fundraising activity, sponsorship or grants from university, sector or government.)

The table in the exercise below summarises some of the more common models

#### E1.1: EXERCISE - Deciding on a funding model

##### Activity

1. The table below summarises different approaches to financing an NSO. In your group discuss each one and identify the advantages and disadvantages of each one.
2. When you have done this, come to an agreement in your group as to the most workable option for your situation. Be prepared to justify and explain your decision.

Method	Advantages	Disadvantages
Charge fees from individual student members		
Charge fees from students' union members		
Seek support from the University/College sector		
Seek support from the Ministry of Education and/or Youth		
Generate funds through commercial activities		
Generate funds through sponsorship		

## **Debrief**

3. Ask the group or groups to give feedback and generate a final discussion about which method they chose.
4. If you have time it might be worth developing some estimates on income for each of the different models.

An NSO can, of course, use a combination of some of the methods analysed above. There can be a symbiotic relationship between students' unions and an NSO; the more finance the SU has then the more that can be passed onto the NSO. It is in the interests of the NSO to support local students' unions to increase their finance through the preparation of submissions.

## **E1.2: Developing a budget**

An open and transparent budget process, with clear indicators of what you are going to spend and why, is essential in developing the credibility of your NSO. Failure to control expenditure or to easily account for how resources have been allocated can lead to debt and personal liability on the part of individual officers, and above all can sabotage your attempts to create a united student voice.

Once you have an idea of how much income you can expect for the year to come, you have two choices. You can spend on activity as and when it arises, which is not a good idea, or you can plan how you are going to allocate resources in a planned way over the year. The first step in controlling your resources effectively is to create a budget. A budget is an estimate of how much money you expect to receive and the areas of activity you wish to spend it on. A budget also allows you to clearly state what the priorities of the NSO are, and places you as elected officials of the organisation in control of expenditure. It also enables your membership to question or amend the proposed budget on an annual basis. The steps in drawing up a budget are as follows:

- Propose guidelines on how you are going to develop the budget. The elected officers of the NSO (possibly a treasurer or financial controller) will do this.
- Discuss guidelines with your sovereign body or a group allocated for the purpose. The process of forming a budget will be the result of discussion and debate between the elected officers of the NSO and representatives from students' union members. In particular, they will need to agree what areas of work should receive priority.
- Develop estimates for each area of activity.
- Assess your income
- Balance estimates with likely income
- Draw up a proposed budget
- Present and vote on the budget at an annual meeting of your NSO
- Once agreed, implement the budget and monitor expenditure against it.

### E1.3: Finance and asset management

The money you are given is held in trust on behalf of others, so for example a students' union will have paid a membership to your NSO in good faith and as the leadership of the organisation it is your job to take careful stewardship of those resources. It is recommended that you engage the services of a finance specialist, book keeper - or if you cannot afford it a student who may be studying these areas who is prepared to volunteer to look after the accounts and provide the management information you will need to control your finances. In the early stages of an NSO monitoring the budget against agreed expenditure and making sure you have a good cash flow will be the most important areas.

Financial control element	Comments
Clarify your income	Make an estimate of how much income you hope to get. Be conservative in your estimate. Try and develop incentives for payment of fees (discount if paid early?) and include any external grants you may have.
Agree a budget	Once you have identified how much you have, then go through the process of consulting your team on areas of expenditure - again it's best to slightly over-estimate what you might spend. You will need to divide expenditure into: <ul style="list-style-type: none"> <li>• Committed recurrent expenditure - salaries, utilities, wireless and phone bills</li> <li>• Capital expenditure - vehicles, office equipment</li> <li>• Residual current expenditure - influencing work, travel expenses; this will very much depend on your priorities.</li> </ul>
Develop a requisition system to authorise expenditure before it is made	Expenditure needs to be agreed by someone (or a group) before it is committed; this means that they can decide on whether the money is there to make the purchase. Once agreed the expenditure can be made.
Develop a receipt collection system that allows you to confirm that expenditure was made in line with agreed costs	Once an item has been purchased then you need to be able to match up the agreed requisition with the receipts and proof of purchase. If someone does not have proof you may need to develop an approach to what to do in this situation - the most obvious one being that it comes from an individual's own resources.
Issue monthly budget updates (targeted at the Executive and/or trustees of the NSO)	Reconcile the figures incomings and outgoings on a weekly basis and produce monthly reports. Once you have been in operation for a year you can compare year-on-year expenditure, which

	will help you make decisions and tell you if you need to be concerned or not.
Agree an approach to independent audit	On an annual basis you should invite an independent company or person to come in and audit your figures. Nothing can more quickly destroy the reputation of an NSO than money being misused or disappearing and a general suspicion of corruption - remember people will always assume the worst.
Agree an approach to reserves	Sometimes reserves are seen as contingencies - resources to be used if there are unforeseen circumstances. In the long term they are necessary to cover longer-term risks - for example if you employ staff you may need to dip into reserves to pay them one month if your cash flow is not in a good state. It is good practice to build up a reserve that will keep the organisation going for an agreed period of time, say 6-8 months. The important part is AGREED - the membership will need a coherent explanation of why some of their fees are being put aside and not used.

### E1.3.1: DISCUSSION: Our approach to finance

Using the table from the previous section meet with your team and talk through some of the issues raised with the aim of developing your own simple finance system.

### E1.3.2: Asset control

Examples of assets that an NSO might have include:

- Buildings, office space
- Furniture and office contents
- Equipment such as computers, printers and photocopiers

All these will need to be **insured with a reputable company**. Given that the NSO may be new then there might not be the resources or infrastructure to actually own a property and the liability may fall to a sponsor or a landlord. However, whoever owns the **building** in which your office is housed you will need to agree and clarify where responsibilities lie. Consider the following:

- Whenever refurbishment is undertaken it is important to check the contract conditions as your NSO could be responsible for the materials on site even before the contract is completed.

- It is useful to maintain good records of amounts spent on improvement and refurbishments, retaining invoices if possible as this not only assists in fixing the sum insured but is also very useful in the event of a claim.
- Insurance cover should be arranged on a 'new for old' basis and any buildings or improvements should feature in an asset register showing the cost of rebuilding as opposed to the 'market value'.

The completion of an up-to-date asset register assists considerably in establishing the sum insured, which again must be adequate if claims are to be settled satisfactorily. So your stand contents insurance should include restrictions on accidental loss or damage, theft following forced entry to the premises and losses from the premises. If you hold any stock to sell the insurance rate should be based on the cost price. So to help with this:

- Up-to-date inventories should be kept for all assets
- Equipment should be marked with a company brand or stamp wherever possible
- All members of the NSO team have a duty to treat all assets with responsibility (you may have to draw up some rules)
- Never leave your office unlocked when no one is around - you may need an entry system even when people are around, depending on the security of the area
- Keep key holders to an absolute minimum - with annually elected officers it is vital that you get keys and other allocated equipment such as laptops and phones back when they have finished their term of office
- Never transfer money alone; vary your days, routes and methods of moving money to the bank

#### **E1.4: Getting more money**

As a new NSO you will need to justify why you need funding to your membership (depending on which model you have decided to adopt), but that in itself might not be enough for your ambitions - in which case you may need to negotiate some government or NGO funding to support your organisation in its initial stages. The next section looks at some arguments that you can make to support your claim as well as suggesting a structure for a written submission in which you can make your case.

### **E1.4.1: EXERCISE - Why should we fund you?**

This exercise not only explores funding for a new NSO but considers arguments about why one should exist at all.<sup>9</sup>

1. Divide your group into two teams.
2. Agree a debating proposition: 'This house/group believes that a National Union of Students is of no benefit to education or society as a whole' - or a similar proposition.
3. Give each team time to develop their arguments for the proposition and those against.
4. Appoint some others to act as judges or a debates moderator.
5. Once the teams are prepared asked them to choose 3-4 speakers each - the first should set out the key arguments, the next develop those arguments and deal with counter-arguments, and the final speaker should provide a summary of their team's position.
6. Once the debate is concluded then ask the judges who they think has won the debate and announce a winner.
7. Then ask each team to summarise the strengths and weaknesses of the arguments used.
8. Capture the arguments and use them when negotiating for support or finance - noting that it is healthy to rehearse the counter-arguments as part of preparing to make the case.

### **E.1.4.2: Developing a submission**

Arguments in favour of creating an NSO include:

- An NSO can provide feedback and advice on developing higher education policy in a country - the experts on being students are students.
- Developing a partnership approach can greatly enhance the role and responsibility of all student leaders; it also allows decision-makers to evaluate a range of ideas they may not have thought about.
- NSOs provide a valuable experience in governance and democracy - running in elections, winning and losing, debating and compromise are all valuable skills that can build and strengthen civic society.
- Having an umbrella NSO allows debate among students to be played out in a safe environment as they work towards agreeing a collective view.
- An overall experience of functioning democracy is of great value.

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<sup>9</sup> Thanks are due to the participants of CSA Student Governance Toolkit Pilot and Africa Regional Capacity Building Workshop at Strathmore University, Nairobi, Kenya 29-31 May 2017 who piloted this debate approach.

- Students who participate in students' unions/associations and any NSO structure develop strong interpersonal skills that help them to become the active and engaged citizens of the future. These skills include public speaking, lobbying, volunteer management, leadership, teamwork and so on.
- Involving students in student representation structures and in national policy-making can enable students and decision-makers to better appreciate each other's point of view and any constraints this may involve.
- Students who are engaged and involved are generally a lot happier.

Whoever you are approaching for funds, it is useful to think about what is in it for them; what language will they respond to? What would they like to see that can help them achieve their objectives? You should also ensure that a reporting mechanism is agreed.

When setting out to prepare a submission it is helpful to:

- Be aware of the funding cycle of the body you are approaching (when is their financial year?) - get any useful dates in the diary.
- Are there particular funding windows or periods that you need to know about?
- Who makes the final decision; is it an individual or a committee (who are they and can you find out what their interests are?)
- Arrange all necessary meetings and pick a team who will go to the meetings.
- The text for your submission will be based on the strategic discussions described in Section C of this toolkit.
- Prepare your negotiating team - make sure you are aware of any previous NSOs that have been active in your country, who they were and what was their reputation. Do you wish to be associated with them or not - remember the people you are negotiating with will have long memories.
- It might be worth highlighting some successful examples of functioning NSOs in other countries.
- Think about the arguments that might be used against you - if an organisation is giving you money they will want to be reassured.
- Think about other sources of finance. Will this help your argument - will it show an entrepreneurial spirit that will be admired or will you need to just focus on this negotiation and this funding potential?

Having conducted your research you will need to bring it all together into a written submission. Here is a suggested structure:

Chapters	Comments
Summary	People are busy; having a succinct summary will allow them to quickly identify what you want.
Explain what an NSO is	Don't assume knowledge - explain what an NSO and students' unions are.
Outline what you are trying to do and why	<p>Explain why you are trying to create an NSO in your country and explain how it will be of benefit beyond the concerns of students.</p> <p>It might be helpful to give some case studies that highlight some specific problems that you are trying to address in partnership with the funder.</p>
Outline strategic plans (x5 years)	If you have developed some idea of a vision, mission and values, strategic themes and issues you wish to address over the next five years then say so here - longer-term planning like this is always more impressive to decision-makers. If you have a development plan include it!
Budget	Cost out all the activity and be very clear what financial support you are looking for and how the funder can be reassured that the money will be well spent and looked after.
Outline support	If you are able to secure wider support from the sector then include any endorsements and testimonies.
How will this benefit students?	Outline what you see as the benefits
How will this benefit the sector, government and wider society?	Outline what you see as the benefits
Outline what actions should follow on all sides	What will the NSO do? What will the funder do? Who else needs to be involved?

Make your submission look good; good-quality printing and binding will show that you are serious. The next phase is to take all your research and implement it in the process of negotiating.

### E1.4.3: Negotiating summary tips

Phases	What helps?	What hinders?
PREPARE	<ul style="list-style-type: none"> <li>• Split objectives between essential and desirable</li> <li>• Put yourself in opposition's shoes</li> <li>• Plan strategies in terms of an exchange - what do both parties get out of it?</li> <li>• Have an observer to take notes</li> </ul>	<ul style="list-style-type: none"> <li>• Ignore other side's power and aspirations</li> <li>• Aim for a crushing victory</li> <li>• Have more than one main negotiator</li> </ul>
DISCUSS	<ul style="list-style-type: none"> <li>• Reduce tensions, settle emotions</li> <li>• Ask open, clarifying and probing questions</li> <li>• Look for linked issues</li> <li>• Look for possibilities to move both sides' positions closer together</li> <li>• Test commitment</li> <li>• Summarise understanding</li> </ul>	<ul style="list-style-type: none"> <li>• Start arguments, score points, make wisecracks</li> <li>• Make assumptions</li> <li>• Aim for a take/take outcome</li> <li>• Indicate movement without concessions.</li> </ul>
PROPOSE	<ul style="list-style-type: none"> <li>• Use the 'if..., then...' formula to construct offers</li> <li>• Questioning, clarifying, summarising</li> <li>• Refer back to original objectives</li> <li>• Focus on facts, not opinions</li> <li>• Allow time for evaluation - adjourn if necessary.</li> </ul>	<ul style="list-style-type: none"> <li>• Interrupt</li> <li>• Reject out of hand</li> <li>• Concede without return</li> <li>• Reformulate objectives or strategy</li> <li>• Think on your feet</li> <li>• Buy peace</li> <li>• Voice opinions not facts</li> </ul>
BARGAIN	<ul style="list-style-type: none"> <li>• Summarise</li> <li>• Give and get</li> <li>• Arrive at a package (that is, a collections of linked variables)</li> <li>• Put a deadlock aside to be dealt with later</li> <li>• Allow opportunities for either side to move</li> </ul>	<ul style="list-style-type: none"> <li>• Deliberately/accidentally omit issues</li> <li>• Threaten unless willing to take action</li> <li>• Bluff</li> <li>• Try to close too soon</li> <li>• Forget to continue bargaining until closed.</li> </ul>
FINISH	<ul style="list-style-type: none"> <li>• Thank everyone</li> <li>• Write back to the 'other side' straight away and clarify what you agreed so that your version of events becomes the one that they are focusing on!</li> </ul>	<ul style="list-style-type: none"> <li>• Make assumptions about what happened</li> <li>• Not acknowledging areas where the 'other side' have shifted their ground.</li> </ul>

## E2: Developing infrastructure

### E2.1: Creating an office hub and administration

One of the initial aims of your new NSO will be to secure some office space to act as a central hub for your day-to-day activities as well as serving as a formal address for any form of legal or financial registration. Options include:

- Asking one of your students' union leaders to provide a room or even a couple of desks within their own institution.
- Seeing if your Ministry of Education and/or Youth has either space or surplus equipment that they can donate. It is best to assume some physical separation from any ministry offices as this will help to emphasise that your prime focus is to make student lives better and that you are not part of the ministry itself. Of course, if there is no other option at this point, you will need to indicate your independence of thought and action in other ways.
- Establishing a partnership arrangement with other similar organisations or NGOs and sharing office space until you have the resources to establish your own.

It will be very important to establish a coherent filing system (online and physical). You will have a number of legal documents relating to the creation of your NSO and you will also need to pass on information to elected student leaders and any staff support they may have. It is recommended that a relationship is formed with an appropriate national archive with which you can lodge key documents relating to your development and history at regular intervals. There may well be legal requirements in your country to lodge certain documents and publications. There will certainly be strict legal requirements to keep financial documents and records, and so you will need to find a secure place for these.

#### **SECTION SUMMARY**

Through engaging in the discussions and sessions in this section you will have discussed options and approaches to funding models that will be appropriate for your NSO and developed an approach to budgeting and managing finances and assets that suits your situation. You will have examined ways to develop a successful funding submission and rehearsed arguments for and against the creation of an NSO.

## F: Communications and Marketing

Communication with stakeholders and decision-makers is a very important activity that NSOs will have to undertake. Well-planned communications strategies and content are important products that NSOs will need to develop.

### F1.1: Planning communications and marketing to the membership

Very few people will actively go out of their way to find out what activities are offered by their local students' union, let alone their NSO. For your activities to be successful and to involve more people, they will need to be carefully marketed by the NSO in partnership with local students' unions. We will start this section with some marketing theory.

Marketing is about more than dreaming up some clever gimmicks or advertising. It acknowledges that your customers (i.e. students and students' unions) are the focus for any organisation and the products that are delivered by the NSO. McCarthy<sup>10</sup>, and Booms and Bitner<sup>11</sup> proposed the following model for successful marketing. The model suggests that there are seven 'Ps' of marketing, as follows;

- Product
- Place
- Physical
- Price
- Promotion
- Process
- People

We will now consider these in more detail and apply them to the world of students' unions and organisations.

#### ***Product***

Think about the 'product' that you are trying to 'sell'. In this case, you are selling the idea of an NSO or a national student movement linked to the local students' unions. This means thinking about what benefits a student may derive from the activities of the NSO and what they may also gain if they become more involved. You are also selling the idea that this student movement is an important stakeholder in the education and youth sectors. Consider what students, policy-makers and the wider public will get out of it, the tasks that members will have to engage in, how

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<sup>10</sup> McCarthy, E., 1960. 'Basic Marketing: A Managerial Approach'

<sup>11</sup> Booms, B.H., and Bitner, M.J., 1981. 'Marketing Strategies and Organizational Structures for Service Firms Marketing of Services'

much time members and/or communications team will have to commit and also how their peers might perceive them if they became involved - peer pressure to engage or not engage can be a powerful influence on an individual. Citizens can be suspicious of governments; equally students can be suspicious of what they may see as 'student politicians', believing they are only engaged in the NSO to further their careers. Even with a new NSO, dispelling myths and perceptions right from the start is really important.

### ***Place***

How will students and elected students' union officers find out about the activities of the NSO? If the students don't come to you, you will need to take your message to them. Consider where students are, where they go, where they might take a moment to read some information and find out more. The local students' union has a crucial role to play here in making sure that their members' students have access to information about the NSO. It is all too common for local students' unions to 'blame' national officers for being remote and absolving themselves of any joint responsibility to publicise the organisation. Quite often an 'uninformed' student feels both levels of student representation to be equally remote!

### ***Physical***

There are numerous forms of communication channels that students' unions and NSOs can use to communicate with students, but equally, especially for a new NSO, it is important that there is some form of physical presence in schools and campuses with logos, and posters outlining the vision and aspirations of the new organisation. National officials and local students' union officers can run 'roadshows' and launch events to get the message across and back this up with the full range of social media.

### ***Price***

If students are required to pay an individual membership fee for the NSO, or if their students' union pays an affiliation fee, both need to know what the return is. This may not be an obvious financial value - it may be in the role the NSO will play in channelling the concerns of students to national decision-makers, which can be hard for local students' unions to do as effectively. There may be other benefits of membership that will be developed as the NSO becomes more established and gains a higher profile. Transparent budget information and, as things develop, audited accounts will be very helpful here. Those who decide they are keen to volunteer for the NSO may need to know what the volunteering policy is and whether they will be reimbursed for travel and other activities.

### **Promotion**

In Section J we will look at how different types of volunteers will be attracted by different messages. There are many different ways of putting across these messages about how to get involved, but any manual that seeks to summarise the variety of methods of online technology available will quickly go out of date. Therefore, the NSO will need a permanent 'go to' presence (a website, Facebook page and/or Twitter account) that is refreshed with sufficient frequency to attract visitors back to the site to find out what is going on in the organisation. Supplementing this 'permanent presence' with immediate direct messaging can have a great impact. You will have to determine which platforms are the most popular with your students, and may therefore be the best way to communicate with them.

Using the membership structure of the NSO can also be helpful with word-of-mouth communication or at the very least creating a climate of action that different levels and activists can be involved with, building a direct line of communication from a class through their class representative who in turn will speak with their faculty/school representative and then on to the overall students' union. The students' union can then pass on issues and concerns to the NSO, particularly if the issue requires a national rather than an institutional solution. The process can work in reverse of course, where national leaders seek to inform and engage students with issues that require national pressure through campaigning or are communicating impact and success. Key points to remember are:

- Communications is a two-way process
- Word of mouth is still one of the most effective methods of communication and engaging students
- Use university or college channels wherever possible - if the promotion of the NSO and its activities is seen as part of normal and important business, students are more likely to pay attention. Lecturers and tutors can also be useful conduits of communication transfer.
- Posters/flyers can still help to create a presence and help students to follow up information online. The development committee of the NSO or the first leadership group need to consider ways in which the project is widely understood by their student beneficiaries. Being given information through university or college registration makes sure that ALL students have received at least baseline information.
- Having a recognisable logo or brand can help to create recognition - having some free gifts such as pens, key-rings, balls, badges, etc., is also helpful.
- Running information and promotional stalls where students can sign up to learn more about how the NSO supports them or how they can get more involved is also helpful.

### ***Process***

It is important to make it as easy as possible to get involved. It should take no more than two clicks on a website or a phone call, or completing a form, to indicate that a student wants to be more involved. Make sure that this process is easy and transparent. Remember that any difficulties at this stage could be real barriers to involvement. Accessibility is vital; if your country has more than one language in common use then this needs to be considered.

### ***People***

The people of any organisation are vital 'marketing' tools. How they appear, how they behave and how they inspire others and demonstrate leadership are critical factors in launching a new NSO. Also, those students who are keen to be involved need to know how they can help, what skills are required and what they can learn. If there are minority communities represented on campus, then reaching out to them can help to sustain and boost the credibility of the new organisation if it is seen to be committed to inclusivity from the outset.

## **F1.2: EXERCISE - Developing a marketing plan**

### **Activity**

1. This tool is designed to assist you in thinking about the marketing of your activities and events that are part of the NSO. If you consider and work on all of these areas, you will have a much better chance of increasing involvement in and profile for the activity.
2. Complete the form below and think about how you will promote the new NSO.

## **Developing a market plan**

### **Product**

What is the activity under consideration?

What particular needs does it satisfy?

### **Place**

Where will people go to engage in the activity?

Where do students need to go to find out about the activity?

Are there access issues for disabled students, students at other sites or part-time students?

### **Physical**

What is the physical environment in which the activity will take place?

Consider the impact of the environment on all five senses.

### **Price**

How much money does the NSO have to spend on this activity?

What costs will there be to student representatives who undertake this activity?

### **Promotion**

List the ways in which you intend to promote the activity?

How will you target students who have previously not been involved?

### **Process**

What are the stages that a student must go through in order to get involved in this activity?

What information is available to students about this process?

### **People**

What qualities do people require to be involved?

What experience will they have?

What training will be provided?

How much time will they need to devote to the activity?

What groups do you wish to target specifically? Do you wish to target any specific groups (e.g. those who are not currently involved, or those studying a particular course)? How will you reach these people?

### **Debrief**

3. Discuss the plans that have been developed and draft a communications timetable.

**SECTION SUMMARY**

Through engaging in the discussions and exercises in this section you will have developed ideas around marketing the new NSO to its members and listed tools, techniques and approaches you can use.

## **G: Diversity and Inclusivity**

An effective NSO will seek to ensure that it represents the full diversity of the student membership (institutional and individual) and will take steps to ensure that different kinds of students feel they are included in the decision-making process and activities of the NSO and their own students' union. We have already recognised in Section B on membership that a new and developing NSO needs to be knowledgeable about student demographics as well as being open to learning, and sharing that learning, about the situation of different kinds of students. A key element of understanding your membership is identifying those groups who, for whatever reason, are disadvantaged by the prevailing social system. You will know best the situation in your own country and region; the following sections will help to focus your discussions on how best to provide support. In this section we will look at:

- Making sure that the NSO is truly representative
- Working with minority communities and groups
- Segmenting the student population
- Layers of oppression
- Empowerment

### **G1.1: Working with students from minority communities**

In order to identify those students who we may see as from minority or disadvantaged communities we first need to discuss and agree who might be the 'majority group'. To help do this we need to agree a way of segmenting groups of students.

### **G1.2: EXERCISE - Segmenting the student population**

#### **Activity**

Go through each of the groups of students (segments) in the table below - think up definitions of who these students might be in your own countries and which of them might be more or less likely to be involved in your structures. Finally, do you agree with this suggested segmentation; are there are other groups or segments you would like to add?

Segment	Who is most likely to get involved?	Who is least likely to get involved?
Student communities formed around shared interests <ul style="list-style-type: none"> <li>• Sporting groups</li> <li>• Political groups</li> <li>• Hobby/activity groups</li> </ul>		
Student communities formed around a shared location <ul style="list-style-type: none"> <li>• Students on a specific campus</li> <li>• Students in a specific city, town or village</li> <li>• Students at different institutions (some may be more prestigious than others)</li> <li>• Students based in an urban environment</li> <li>• Students based in a rural environment</li> </ul>		
Student communities based on administrative procedures <ul style="list-style-type: none"> <li>• Student year groups</li> <li>• Undergraduates</li> <li>• Postgraduates</li> <li>• International students</li> </ul>		
Student communities with a shared identity <ul style="list-style-type: none"> <li>• Disabled students</li> <li>• Ethnic minority students</li> <li>• Students with a shared (different) language and culture</li> <li>• Female students</li> <li>• Other groups</li> </ul>		
Do you have any other segments you think you need to add?		

### **Debrief**

Go through each of the segments and develop a narrative for your own NSO on which might be seen as the dominant groups and which groups may need more focus to become engaged. Some groups that you have identified will be classified as mainstream and other groups and cultures might be seen as more marginal and perhaps unusual. They may well be hard to reach. The ‘mainstream’ in this instance does not necessarily mean the majority, but it will be the group that sets the prevailing culture about how things are done, and maybe - unless you are careful -

how things may be done in your new and developing NSO. In effect the margin has to adapt to what the mainstream sets up.

### **G1.3: Privilege and oppression**

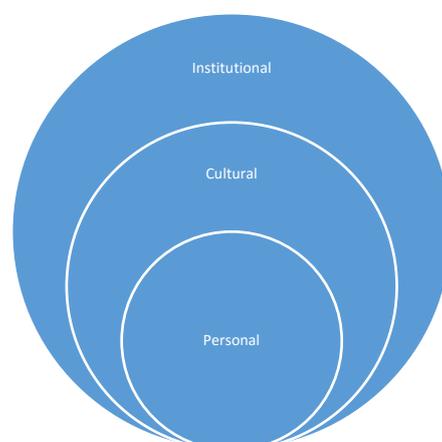
As elected leaders of your NSO you will no doubt have been elected by some of the groups or their representatives. If the mainstream's views prevail then this constitutes a level of privilege in the context of the NSO. Student identities are complex and privilege is relative, but equally privilege is not available to everyone in society or all of our members within the NSO. Privilege and power are usually linked, giving one group power over another.

The other side of privilege is to explore what happens to those groups who feel they have been left on the margins; students with relative disadvantages and little or no power.

### **G1.4: EXERCISE - Layers of oppression**

1. Figure 7 shows different layers of oppression.
2. Ask the group to look at the labels for the different layers - make sure they all understand what they mean before starting the discussion.
3. Go through each one, recording reactions in the comment box - try and identify which groups of students that your NSO represents might be affected by these layers of oppression. Can they think of other examples?
4. Ask the group to consider what they can do to ensure a greater level of involvement.

*Figure 7: Layers of oppression*



Layer	Type	Example	Comments
Institutional	<b>Institutional oppression</b> occurs when society gives privilege to one group at the expense of another through the use of language, media, religion, economics and laws	When a person watches TV and sees one ethnic/racial group as actors, news presenters and talk show hosts	
Cultural	<b>Community oppression</b> is oppression that one experiences within a community to which the student belongs	A local newspaper singles out an immigrant community, international students as the cause of a local problem	
Cultural	<b>Group oppression</b> is the oppression a student may feel as part of a wider group of students	A group of student friends make plans to take a trip as a group without recognising that one member of the group is unable to take part	
Personal	<b>Individual oppression</b> occurs between students in one-to-one reactions	A landlord refuses to let a flat to a student on the grounds of their race, gender or sexual orientation	
Personal	<b>Internalised oppression</b> is the process by which students who are the targets of oppression begin to believe the prejudices that are held about them	A deaf man think he deserves to be treated poorly because he is a deaf man	

### Debrief

5. Discuss the group's views and thoughts about the layers of oppression discussed in the table above.
6. Ask the group to what extent they think that one layer of oppression drives the next.
7. Ask the group to think of more examples for each of the layers.
8. Discuss what your NSO can do to challenge some of these oppressions and what steps can be taken to involve more groups of students and to support them in that engagement.

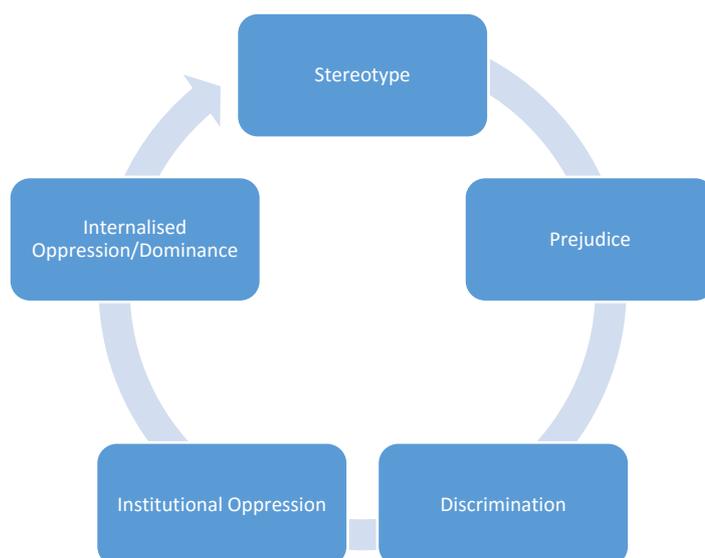
## G2: Tackling oppression through autonomy and empowerment

### G2.1: Autonomy

NSOs can play a significant part in challenging and tackling layers of oppression and creating the space for traditionally marginalised groups to organise themselves and lead the campaign to redress the prejudice that they face and the consequent imbalances that may result. This means through your structures shifting the balance of power to those that need it, and supporting your students' union members to be supportive of this work. This means removing barriers to participation where you have the power to do so and establishing measures to ensure fair representation and supporting the autonomy of the oppressed group and their empowerment to tackle the issue and take the lead themselves. The role of the NSO is to facilitate the learning of others in this area to avoid a situation where some of the groups who can be said to have privilege dominate the debate or indeed decide what's best on behalf of the oppressed group.

### G2.2: Empowerment

Empowerment is about contributing to and providing a set of conditions in which students don't face discrimination or oppression. Figure 8 shows a 'Cycle of Oppression' that links together how some of the stereotypes we use can feed prejudicial views that in turn can lead us into discriminatory actions that contribute to oppressing individuals and groups. The role of the NSO working in partnership with their students' union members and student leaders is to break this cycle and create as inclusive an environment as possible.



*Figure 8: The cycle of oppression*

To break the cycle you can:

- Treat people fairly, while recognising that a 'level playing field' approach will be insufficient and at times you will need to acknowledge differences and make appropriate adjustments
- Value diversity and say so publicly
- Trust that the experiences of others give them authority over the oppression they are subjected to and how they tackle it
- Demonstrate a commitment to justice, fairness, inclusion, respect and dignity
- Challenge discrimination and harassment
- When planning events or making decisions think about how they will impact on students from different groups. If you don't know, ask
- Create and share space with different student groups.

#### **SECTION SUMMARY**

Through engaging in the discussions and exercises in this section you will have discussed ways of making sure that your NSO is truly representative of the student population and ways of working with minority communities and groups. You will have segmented the student population to identify ways of reaching out and engaging them and identified theories relating to layers of oppression and ways in which an NSO can empower student groups.

# H: Policy development, advocacy and political /influencing

## H1: Developing policy positions with your members

You need to strike a clear balance between having a set of rules that can allow everyone to speak in turn and put their position across in a way that everyone can understand, and having too many rules that are so intimidating that people don't feel able to speak - or worse, they feel that the 'leadership' or the majority of people in the room have already come to a conclusion.

Certainly at the start of an NSO it is important that you allow as many perspectives as possible to be articulated. If debate is shut down too early then your participants may disengage very quickly. In this section we will look at:

- Approaches to policy development
- Developing policy-based work plans
- Influencing government policy
- Features of an influencing strategy
- Prioritising policy and finessing the message
- Delivering change
- Campaigns and the impact chain
- Theory of Change
- Mobilising student support
- Developing a partnership approach
- Communications plans

### H1.1: Two models of policy development

Look at each of the options outlined below and discuss which you think would be more appropriate for your situation

### OPTION ONE

1. Participants are asked to submit text in advance, known as 'motions' or proposals.
2. The proposal can be simple or complex. An example of a simple proposal would be: 'I propose this union argue for free education'. A complex proposal will bring in research and opinion, and the first part would state the facts (starting 'this union notes...'). Then in the next section, the proposal would state what they believe (e.g. 'this union believes...') given the facts about the situation. Finally, the proposal would outline what will be done based on the facts and beliefs (e.g. 'this union resolves...').
3. This text would be put to a meeting and there would be speeches for and against. The first speech would usually be called the proposing speech and the debate would be closed with a summation speech.
4. A vote is taken and the policy is either agreed or not.
5. Of course there may be more than one set of beliefs amongst those present at the meeting, in which case you can introduce amendments which can either add to the proposal, take away text from the proposal or delete the proposal entirely and put forward a different set of facts, beliefs and actions. Amendments are generally dealt with after the first main proposing speech for whatever has been chosen as the 'Main proposal'.
6. The larger the meeting the more complex this system can be, but if regulated and well chaired it can ensure that everyone has input, creating a level playing field. On the other hand, it can be manipulated by those that are both familiar and confident with the rules. Often a 'steering committee' can be created (elected or appointed) to examine all the positions put in (which may well be similar) and through a process of negotiation decide upon an order of debate.

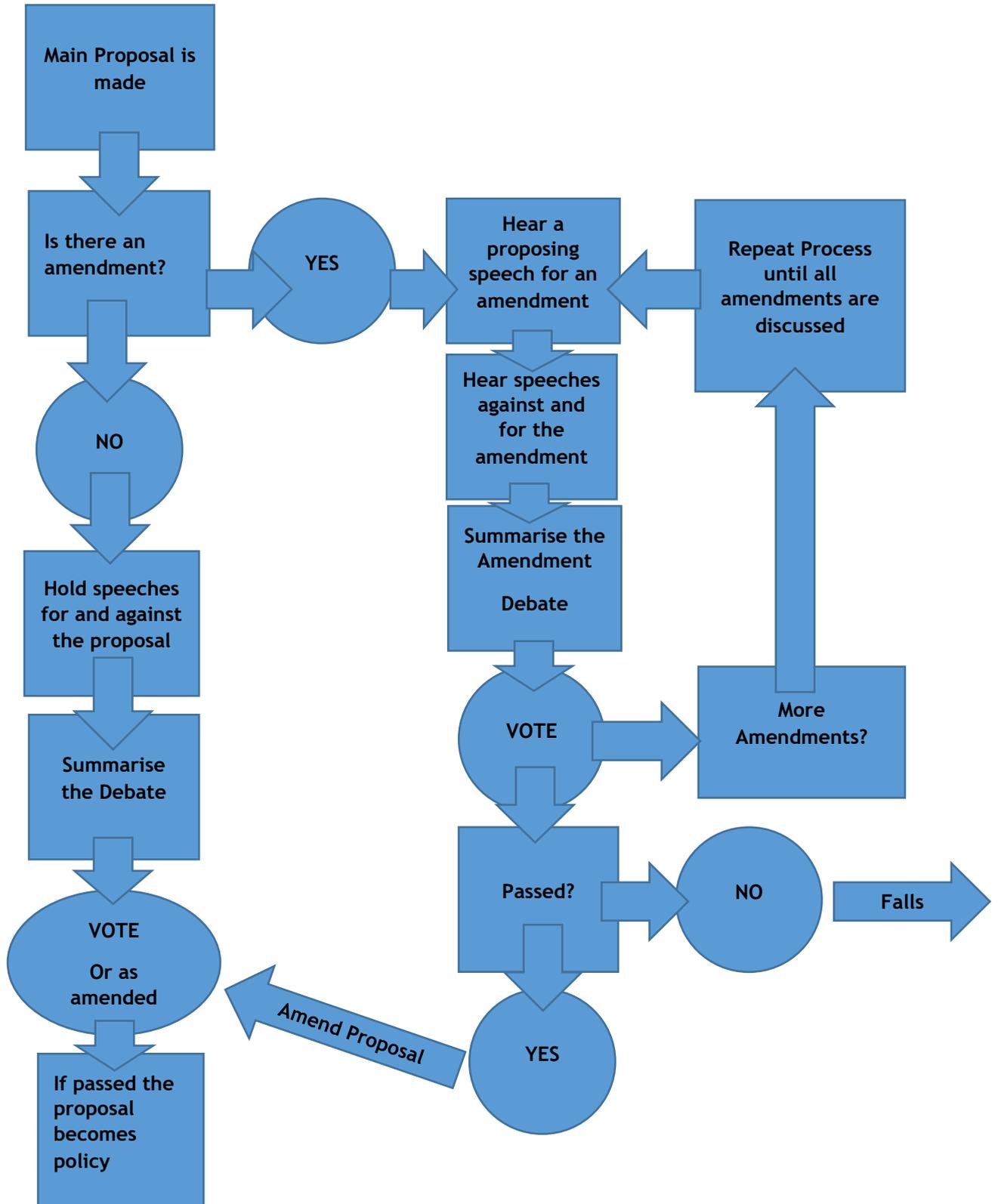


Figure 9: Policy debating process (option one)

## OPTION TWO

1. Ask the participants to shout out what issues are of concern to them right now - try and group these into five or six subject areas.
2. Appoint a group facilitator for each of the subject areas (round a table if possible) and develop a discussion on the issue.
3. Ask participants to go away and research facts and figures.
4. Armed with the facts and figures ask them what they think and what they would like to do in an ideal world - or what would solve the problem?
5. The end result should be a narrative that outlines the problem, backs it up with facts and has an agreed set of actions.
6. You can vary the options by passing the draft policies from group to group.
7. You can either formally debate the results in the manner of option one or endorse what should by now be a consensus proposal.

There may well be other options and approaches that you are familiar with or would suit your circumstances in a better way.

After a number of years of operating you may find that you have a lot of policy on your books and only a limited time in which to carry out the actions. Much will depend on what is current as an issue. Figure 10 summarises the range of work that can impact on the work of an NSO.

*Figure 10: Factors that can impact on the work of an NSO*



- **Legislation** - the government's legislative programme may well contain proposals that the NSO will need to respond to on behalf of students
- **Manifestos** - elected officers will have a set of issues that they will have promoted during their election
- **Policy** - as we have seen, policy debate will set out areas of work that the members wish to see carried out

- **Students' union priorities** - your students' union members may have areas of priority that they may expect you to support them with
- **Events** - this represents those things that happen that no one had anticipated
- **Sector** - the education sector will often seek to engage NSOs, asking for feedback on new educational initiatives.

Suffice it to say there will often be more work than the NSO can realistically deal with and therefore a prioritisation process is essential. Figure 11 links the student journey with key areas of concern. Linking all areas is the core mission of the NSO.

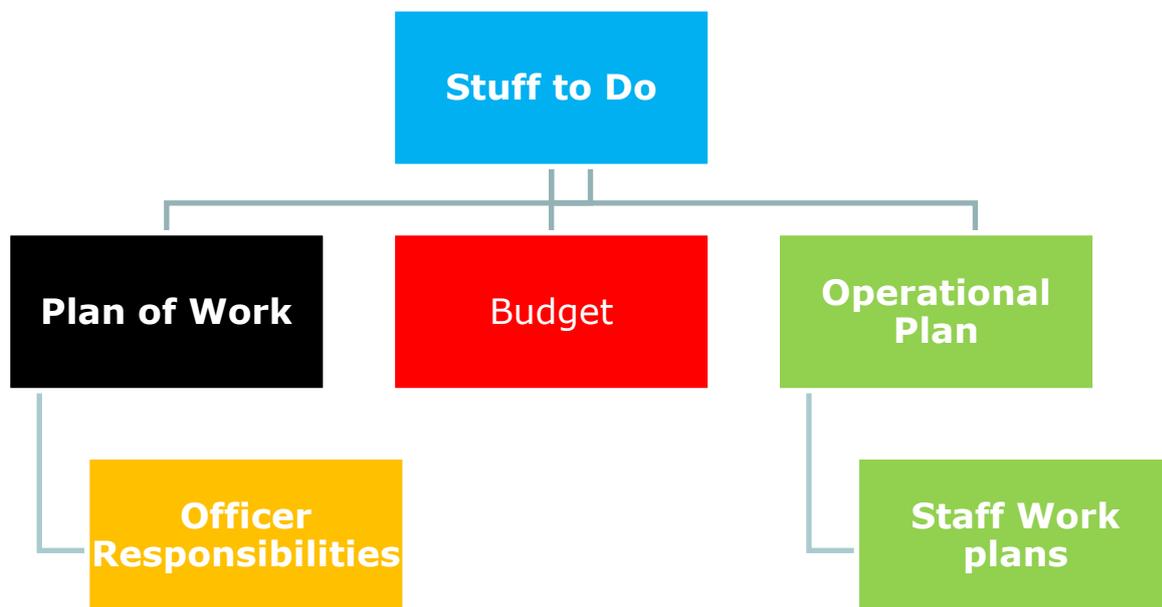


*Figure 11: The student journey and the NSO*

- **Getting in** - an NSO needs to be concerned with policies that enable students to feel able to go into higher education; widening access, financial support, guidance
- **Staying there** - an NSO will need to be concerned about strategies that enable students to stay in higher education - welfare advice and guidance, retention, bursaries, academic guidance
- **Being there** - an NSO will focus on strategies that enable students to make the most of their time in higher education through co-curricular activities, personal development, clubs and societies
- **Leaving** - an NSO will be concerned with graduate employment, careers guidance, the values and aspirations that students leave with.

Prioritising can be difficult; the key thing is to involve the membership in the process and be clear about what you think can realistically can be done and what cannot. For example, there may be several concerns about student funding. If the government has just agreed a new finance system then it is unlikely that they will

revisit the issue in the short term, but on the other hand if the issue has not been discussed for a while then presenting evidence and making the case for an improved system is an opportunity not to be missed. Having brought together all the things that *could* be done, and having looked at the issues based on your best judgement of student priorities then the NSO will be in a position to develop a plan of work. This plan will outline the issue and what the NSO intends to do about it and who will be responsible for carrying the work out. Figure 12 shows the relationship between the plan (which outlines what will and will not be done) and what officers are responsible for which areas. The plan itself translates into a more detailed operational plan that gives staff - if you have - them clear guidance on what they need to do to complement the work of the elected officers. Of course, all areas of work will be limited by available resources, most notably the budget.



*Figure 12: Relationship between plan and responsibility*

Once a plan has been developed then building support is critical by consulting the members on whether the plan is acceptable to them. The plan, in effect, forms a contract for the year in which the NSO makes it very clear what they hope to achieve on behalf of students, how they hope to engage students and how they intend to influence government and other decision-makers.

## **H2: Key approaches to influencing government policy and the media**

One of the key roles that an effective NSO will play is articulating student concerns to national decision-makers. This means that it is important to develop a systematic approach to developing policy (see previous section), developing research to back up arguments and developing professional relationships with politicians and those that they work with. This section outlines some tips for doing this and subsequent sections will help your group to develop influencing and public affairs strategies that suit your own national situation.

### **H2.1: Features of an influencing strategy**

- The public stance of the NSO on a given issue needs to be grounded in decisions made through its own democratic structures relating to membership concerns. This needs to be clearly evidenced. Issues concerned may include student funding, access to education, employability, etc.
- Lobbying ministers, party spokespersons, civil servants, advisers and other key stakeholders within the wider sector and engaging in consultation processes.
- Putting key aims on the agenda through engagement with the media, providing media outlets with exclusives and using the NSO's perspective on contemporary issues, research or the tabling of questions to government and motions (where applicable) to help create publicity.
- Utilising the activism and campaigning strength of the membership and wider organisation to influence opinion-formers.

All of these features help to build a strong public profile for the NSO. As leaders of the organisation you will soon get a feel for the main issues that students are concerned about and what the key challenges are for both the short and the long term. You will also need to balance what your membership is asking you to do with what can practically be done. This does not mean you drop an issue if it is not on the government's agenda; you just need to work out how you will get it on to the agenda. In the meantime, there may be legislation going through your Parliament that you know will impact on the lives of students, therefore this should become a priority within the public affairs work your NSO is doing.

### **H2.2: Prioritising policy and finessing the message**

As time goes on your NSO will develop a wide and diverse range of policies. These will all be seen as important, especially by those who initiated the debate. However, it is vital that as elected leaders you choose the priority policies you wish to focus on to help maximise the impact of the campaigning, lobbying and media work that you do. It's crucial that whatever issues are prioritised are most important to the

students you represent. This choice will also need to be pragmatic and realistic as you will not have sufficient resources to tackle all issues.

Picking specific policies for action makes an NSO more targeted and focused, and makes it easier to succeed. It also keeps your message as strong and as simple as possible to understand and remember. When conducting lobbying, it is of paramount importance that as a leadership team you understand the full implications of, and reasoning behind your policy aims. You need to be sure of how any particular policy change would be resourced, by government or by any institution. It would undermine an organisation's case to ask for something if they don't know how government would be able to afford it. With any policy issue, when involved in either lobbying or media promotion of policy aims, it is important to remain principled but also be pragmatic.

### **H2.3: Know your audience**

It is absolutely crucial that the leadership of an NSO knows the audience they are dealing with when lobbying and communicating aims. Some of the political parties' prime concerns might be saving money and making efficiencies, while for another it might be making the case for investment to promote growth, or investment in public services. Some might see students and education as important; but others less so. The important element is to tailor your message, without compromising policies, values and beliefs, to areas of mutual benefit. It is very important that any message is adapted according to the organisation or person, but remains consistent with policy aims. Politicians and parties are more likely to deliver or provide assistance if they share your campaign's broader aims or like your ideas. The exercises below will help your team develop an approach to dealing with the range of stakeholders you need to talk to.

### **H2.4: Essentials for delivering change**

There are a number of key approaches an NSO can take to advance a policy position and persuade government to implement it.

- Establishing a strong case to back up your policy aim
- Getting media coverage for your stance
- Engaging effectively and efficiently with politicians and stakeholders
- Helping government and stakeholders with forming policy - becoming a great source of ideas
- Building a coalition of support for the policy across sectors - creating a climate in which what you want to do is seen as sensible.

In advancing a policy aim, a crucial first step is that an NSO ensures that facts and figures are presented to back up its standpoint. A clear framework which

demonstrates the benefits/needs for a policy to be implemented is essential. To build up the **strongest possible case**, it is very important that the NSO can point to concrete evidence as to why its policy standpoint should be implemented. This evidence can be gained through parliamentary questions, information requests, research from other organisations, or surveys set up by your NSO and its membership. It is crucial that your NSO builds and maintains strong contacts with the media. The NSO must continue to have its voice heard in the **media** in both a proactive and reactive way. The media can help place very significant pressure on decision-makers and lets decision-makers know that they will be held accountable for their actions in the public forum of the press. Robust media presence helps set a strong tone which works to complement constructive negotiations with government.

You need to position your NSO as an organisation that are the experts on the student experience and issues that impact on student lives, and continue to utilise this expertise to keep your profile as high as possible. It is also crucial that you continue to provide new angles on stories and highlight research in relation to your policy aims to ensure you keep your campaigns on the media agenda to help apply pressure on government. In terms of media relations, it is important that clear protocols are in place and are followed to ensure that the NSO gains the maximum benefits from any coverage and also to protect the image of the organisation. The sorts of issues you may include in a protocol are:

- If anyone from the NSO, either officers or staff, are approached by a journalist they should let the prime spokesperson know as soon as possible, so that they are aware of the matter and can provide assistance or guidance if necessary. It is usual for the lead elected officer to act as the main spokesperson. They may, of course, be supported by staff who may have a public affairs role or they may choose to delegate to a more appropriate officer to deal with an issue - however, having a first port of call allows the NSO to develop a professional approach.
- Also, if a journalist calls to request quotes or an interview on the spot, it is always a good idea to tell the journalist you will call them back, to give elected officers an opportunity to seek guidance and make sure that any message is consistent.
- If anyone from the NSO, either officers or staff, have a story they think the media would be interested in, they should go through the same channels. This is to ensure that all angles on the story are examined and to ensure that the NSO extracts the maximum impact from it. There may be alternative angles on what could, from first glance, appear a very positive story, and this might cause difficulties for the organisation. This is why it is important to think through and discuss a collective line.

- If you are attending an event where media might be present and you are unsure of the NSO's line on a particular issue, speak with the prime spokesperson before you go.
- Before you take part in any interview or talk to a journalist about an issue, note down three key points you wish to put across on the subject, and if you need further assistance in advance of the interview again seek guidance as outlined in previous points.

Examining potential questions that the media might pose and examining potential consequences of the policy you are advocating are also essential to building strong and positive media relations. For example, if you are lobbying for an increase in funding for student accommodation, you need to have ideas as to where the funds can come from to pay for the new student accommodation. Examining how wider society will view a campaign is very important. If an NSO cannot garner sympathy or support with the public, you may damage your organisation's reputation, or decrease potential future impacts if you move forward with a particular campaign.

It is important that as leaders of your NSO you go and **talk to politicians**, relevant pressure groups and key opinion formers. Again, it is absolutely crucial that you know your audience and articulate your message in the most effective way possible. The message put forward must be tailored according to each political party, while keeping your policy exactly the same, to try and garner support from each party you are meeting with. It's not just the directly elected politicians; forming positive professional relationships with special advisers, political party staff and civil servants is also crucial in getting across your ideas and influencing the political process. Don't just focus on senior people - remember it is quite often junior members of staff who have to develop initial drafts of party or governmental positions and they will often be grateful for any ideas you may have. Credibility is the paramount currency for an NSO seeking to influence change and have positive media relations and lobbying activities. A positive engagement with government and parties can help to ensure the best possible outcomes for your student beneficiaries. You may not get your own way all the time, but you won't ever get it unless you try. A constructive approach enables better negotiations on policy matters and is more likely to enable a positive outcome for an organisation; as the experts on student life the NSO needs to get into the position of helping to develop solutions for the future. The more conversations you have at this level the more your agenda is being listened to. Being seen as an expert in your field means that the NSO is becoming **central to the creation and implementation of public policy** in that particular area. Influencing policy is an on-going process; however, one of the key stages where you can push for significant change in relation to policy formation is the period in advance of election campaigns, when politicians and their staff are creating their manifestos. It is extremely important that an NSO **works with other organisations** to maximise the strength and voice. Other organisations may have resources that

could help in relation to furthering your campaigns and it is critical that you engage with other organisations that share your aims.

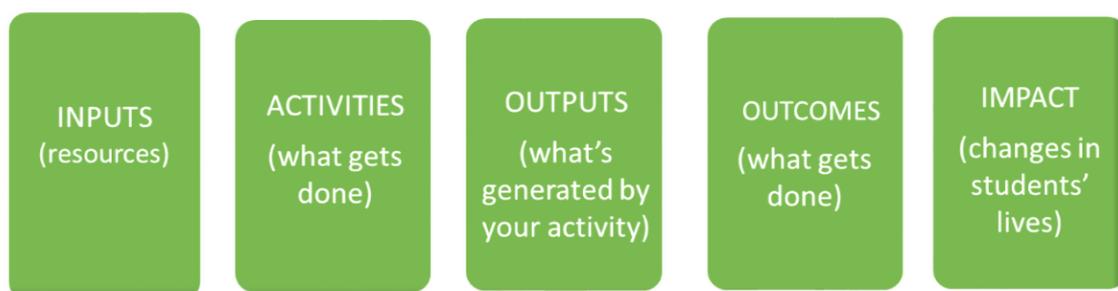
To be in the best place to advance your policy aims it is absolutely crucial that you understand the standpoint and policies of the politician or organisation you are lobbying. In influencing change and negotiating on policy with government, it's best to have an ambitious starting point because it is highly unlikely that any organisation will get everything they ask for. It's also important that the NSO decides upon alternative proposals to present within negotiations, and examines any worst case scenario to help work out how best to proceed. This helps ensure that negotiations don't simply end once starting policy positions are outlined, and also helps lessen the possibility of the worst case scenario actually happening.

In terms of influencing, it is crucial that the NSO examines the best approaches to harnessing all its potential and utilises a three-pronged approach to achieve policy gains, as follows:

- Empowering and encouraging officers and activists to campaign for change
- Lobbying and negotiating with ministers, political parties, government officials and special advisers
- Applying pressure through coverage in the media.

It is crucial that regular meetings or communications take place with ministers who have responsibility for further and higher education, as well as their officials and staff, and with the main political parties to ensure that you keep your policy aims high on the political agenda. The key to good relations is positive and constructive engagement as well as positive and proactive promotion and image management.

## H2.5: Campaigning and the Impact Chain



*Figure 13: The impact chain*

The representative role of an NSO is to ensure that the needs and aspirations of their student members and beneficiaries are articulated to decision-makers and, where necessary, there is a positive change in their lives and situation. The NSO will be involved in dialogue with decision-makers that may or may not achieve the desired result. Change can often come through different activities and inputs: through

campaign work, outside parliamentary or sector structures in which a group or community can highlight and make the case for a change they would like to see. Advocacy campaigns are about generating change. We can begin to measure change by thinking about the overall IMPACT, which is the difference between your stated objectives and the actual results - the outcomes. Impact reporting requires the recognition that campaigns will ultimately be judged on how successfully the stated objectives have been achieved. How much of what you said you would do have you done?

When planning an advocacy campaign (and in this early environment it may well be that the campaign you are seeking to mount is about establishing an NSO in the first place), then you need to develop what are known as SMART objectives, as outlined in the table below.

Element	Description	Example
<b>Specific</b>	What is the specific aim that you have?	Develop a set of constitutional documents for our NSO by November this year
<b>Measure</b>	How will you know that you have been successful?	The documents will have been published (in print or online)
<b>Achievable</b>	What are the key stages you will need to go through to make the change happen?	These are the stages that you would go through - for example: Recruit drafting team Review options and learn from other organisations Develop a draft set of documents Circulate the documents and seek feedback Amend documents based on feedback Produce draft for discussion at inaugural conference Support interim committee in debating the documents.
<b>Resourced</b>	What financial resources do you have available? Who will carry out the plans	How much can you allocate to the project? How much is needed? Who needs to be involved?
<b>Timed</b>	When will the objective be achieved by? What is the deadline?	November this year

Once you have developed some SMART objectives it often helps if you start at the end, with the destination: what impact are you hoping to make?, and then work backwards through the diagram of the impact chain shown in Figure 13. The campaign will address a problem, generate the right objectives, recognise what needs to be done to reach the objective and design activities to produce a set of outcomes that will make the impact. So, we go from the changes we wish to make in student

lives, to a set of outcomes which in turn are the consequence of the outputs that have been generated by the range of activities that you have engaged people with. Using an impact chain can be confusing if those developing the plan are not clear on definitions. Here are some that should help:

- **Activities** = a task or group of tasks undertaken - what gets done
- **Aim** = a definition of overall purpose of your campaign
- **Campaigning** = the mobilising of forces by organisations to influence others in order to effect an identified and desired social change
- **Campaigns** = organised actions around a specific issue seeking to bring about changes
- **Evaluation** = an assessment of the performance of the campaign against expectations and its stated objectives
- **Impact** = changes in people's lives, benefits accrued for those you represent, a measure of change
- **Inputs** = resources that you put in time and money and expertise to help you achieve your objectives
- **Objective** = desired result that will lead to the achievement of the campaign aim. It is essential that each objective should be stated in a way that makes it possible to assess whether or not it has been achieved.
- **Outcomes** = changes resulting from the outputs. What are the results of what we are doing, milestones of change, measure of effects.
- **Outputs** = what is generated by your activity? The number of press articles, the number of petition signers

## H2.6: Theory of Change

- A theory of change is a method of mapping out how you will achieve the long-term objective of your campaign
- It helps you to focus on the necessary steps required in order to achieve your campaign objective
- You can use the model to see how your work fits into a campaign to bring about either longer-term or nationwide change.
- The theory of change should include all steps on the path necessary to achieve long-term goal - without them we assume the goal cannot be achieved
- Drawing up a theory of change can help you eliminate 'nice to have' but not essential steps
- Drawing up a theory of change can help you see the big picture quickly
- Allows you to think through what changes must be achieved before you start thinking how you will do this
- The actions or interventions at the bottom of the chart create the preconditions for the intermediate outcomes that lead to your long-term outcome being achieved.

Figure 14 shows a worked example from NUSUK relating to their campaign to secure maintenance grants. The top shows the long-term objective of the campaign: that the government halts its plans to scrap maintenance grants and replace them with loans. The next layer down outlines some of the intermediate outcomes and shows that the focus for campaigning is persuading members of parliament and at the time winning over public opinion. For those things to happen their needs to be a set of preconditions which in turn have come about due to the interventions and actions of the NSO, in this case NUSUK.

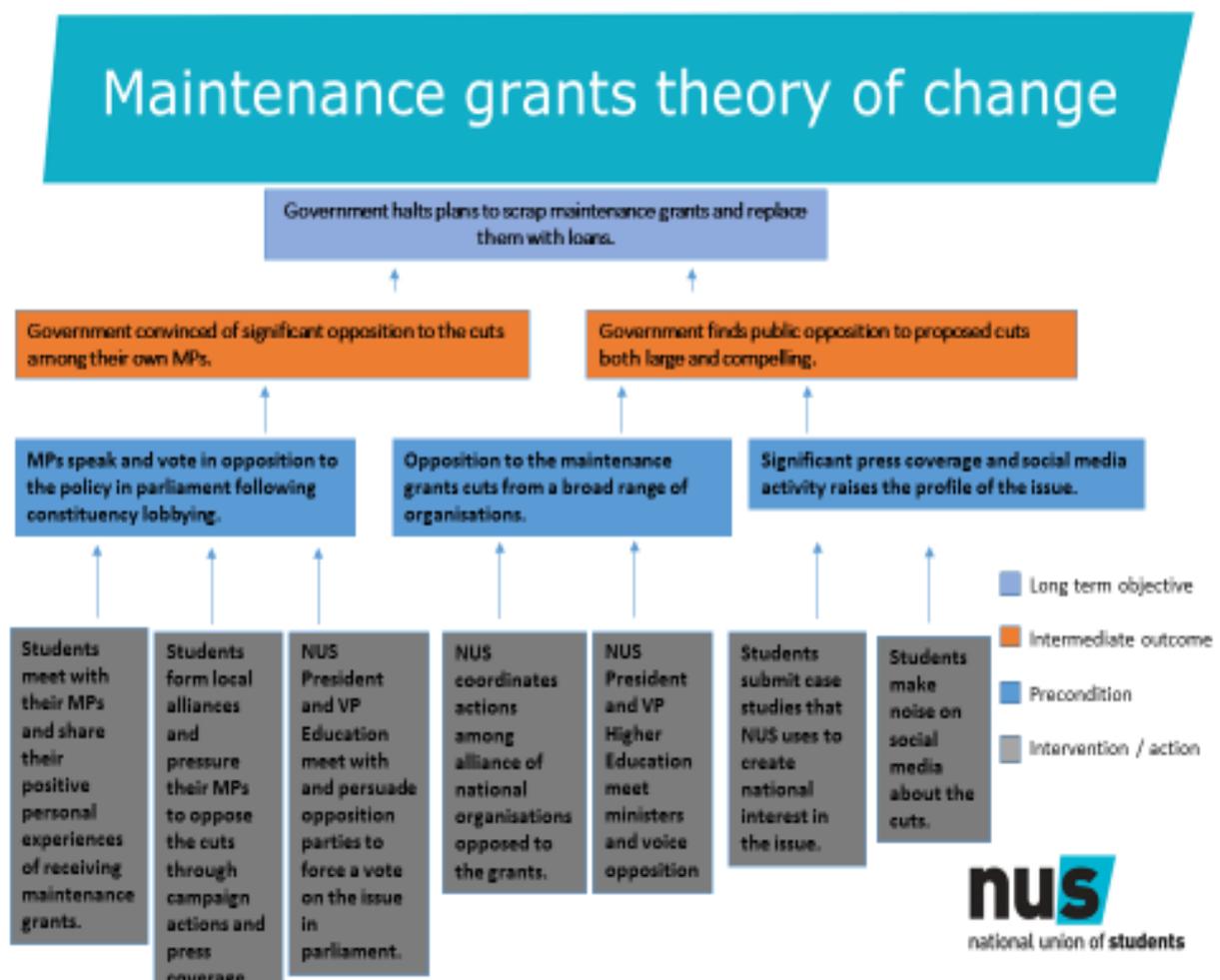


Figure 14: Example theory of change model - NUSUK maintenance grants campaign

Once you have created a theory of change model it helps to provide a focus for activity, identifies what needs to be done and weeds out those things that might be nice to do but don't move the campaign forward.

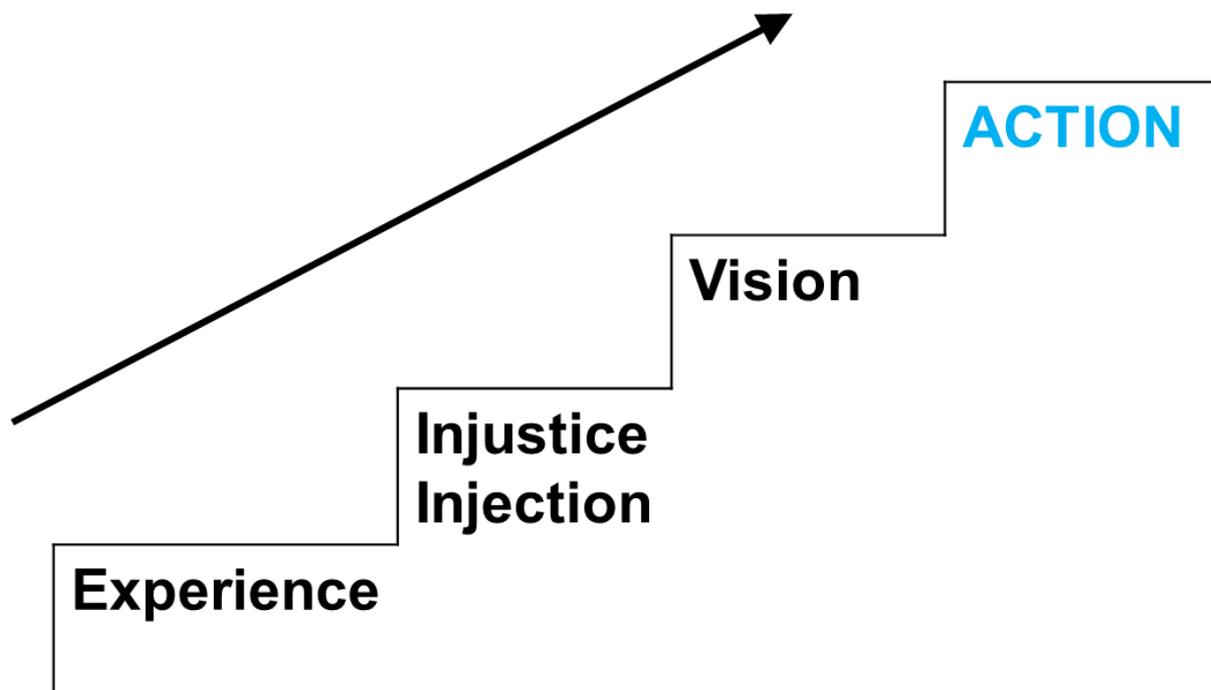
## H2.6.1: EXERCISE - Developing your own theory of change

With your group take some time to develop a 'theory of change' model that addresses a change that you will be keen to make over the next few years.

1. Talk through the model outlined above
2. Check the group's understanding
3. Agree an issue to discuss
4. Use three different colours of sticky notes: one each to represent the intermediate outcomes, preconditions and interventions/actions. The long-term objective can be written on a large piece of paper.
5. If you have the opportunity then present your final model to another group of students or mentors to help develop understanding.
6. Review the process and discuss with your team the pros and cons of using a theory of change model.

### H3: Mobilising student support

One method of engaging and mobilising student support is to use the 'Apathy Staircase'.<sup>12</sup> You can use it in ways to structure an individual conversation you may have with a student, to structure a speech you might make to a group of students to persuade them to take action, or more generally to help you plan the key messages for a campaign you are organising and the impact that you want to make.



<sup>12</sup> Agenda Magazine. Association of Managers in Students Unions. Jim Dickinson 'Making People Care - the Apathy Staircase'. November 2002. No 74.

Figure 15: The Apathy Staircase

### **H3.1: EXERCISE - Using the Apathy Staircase**

#### **Activity**

1. Explain the Apathy Staircase model to the group and make sure they understand it.
2. Divide the group into pairs and ask each individual to think of a campaign or a cause that they would like to persuade people to support. Give them some time to structure their 'pitch' using the Apathy Staircase model.
3. Ask each pair to face each other and choose whether they are person *A* or person *B*.
4. Ask the *As* to pitch their campaign using the Apathy Staircase model.
5. Ask the *Bs* to do the same.
6. When they have both had the opportunity to do this move on to debrief.

#### **Debrief**

7. Ask each participant how it felt to pitch the argument and how it felt to have the argument pitched.
8. Seek general feedback on the usefulness of the model

### **H4: Stakeholder engagement - building partnerships and alliances**

Earlier on in this section we identified the importance of developing regular contact and professional relationships with those who have the power to make decisions about student lives. The discussions and exercises in this section will help you to identify who these key decision-makers and influencers are and how you, in turn, can influence them.

#### **H4.1: EXERCISE - Influencing decision-makers at a national level**

One of the key roles for the new NSO will be to represent the needs and aspirations of the membership as expressed through the NSO's democratic structures; which will, in turn, be influenced by debates within local students' unions. Developing relationships with key players in government, the education sector and the wider NGO/charity sector will help to build the public profile of the NSO. During the initial stages of development for your new organisation the team will need to:

- Meet with senior figures to explain the intended purpose of the organisation
- Develop relationships that enable students to influence national decision-making
- Secure moral and/or resource support
- If required, develop a legal platform for the NSO.

**NOTE:** The exercise that follows can be run in three ways. You can focus on organisations AND/OR individuals (or both) operating at a national level who may

have an interest or an influence in/over the NSO, students' unions, or students in general.

### **Activity**

1. To run the session, you will need some masking tape and some cards, one with the word POWER and another with the word INTEREST written on it. You will also need some blank cards, flipchart and felt pens as well as some masking tape.
2. Explain that the NSO could have really well worked out plans and strategies, but these will get nowhere if people don't know what we do and how the NSO can add value to policy-making in relation to the student experience. This is one of a series of exercises that will help work out how your NSO can develop and enhance the necessary relationships with key stakeholders. The first step is to work out who these stakeholders are.
3. Ask the participants to identify groups who might an interest (positive or negative) in the development of your NSO, right now in the development stage and in the long term. Who would be interested in or benefit from an on-going relationship with the NSO?
4. Generate a discussion about the list and secure agreement from the group on the main stakeholders to focus on.
5. On the floor of the meeting room create an axis. You can ask the participants to do this, using Figure 16. Explain that the X axis (vertical) represents the amount of INTEREST an organisation or individual might have in the development of the NSO whilst the Y axis (horizontal) represents the amount of power an organisation or individual has over the future development (or even existence) of the NSO.
6. Write the names of the key stakeholders that have been identified on individual pieces of card and hand them out to the participants. Ask them to stand in the axis grid at the point they think the organisation or individual on the card lies in relation to power and interest.

### **Debrief**

7. When everyone is happy they are standing in the right place ask each one in turn to say why they are where they are. Ask other participants if they agree with the placement.
8. Once there is agreement ask the participants to stay where they are and explain each of the quadrants in Figure 16 using the definitions in the blue box below.

Low interest - Low power = these are people we just need to monitor  
Low interest - High power = these are people we need to keep satisfied  
High interest - Low power = these are people we need to keep informed  
High interest - High power = these are people we need to manage closely and have a close relationship with

9. Generate further discussion; record the positions for later and move on to the next exercise.

## STAKEHOLDER ANALYSIS GRID



*Figure 16: The Stakeholder Analysis Grid*

Put the results from this exercise to one side. A key outcome is that the group will have identified the key organisations/committees and important individuals who will have an overall influence on the success of the organisation.

### H4.2: EXERCISE - Developing a partnership approach

The previous exercise helped to identify who was important to influence in any given situation. This exercise analyses what you think they may think of you and how, if that is negative, you can set about turning it around and helping to develop a more positive view. For this next one you should keep the floor grid you made and just change some of the headings based on the diagram below. You will need some masking tape and some A4 cards which say SUPPORT, INVOLVEMENT and then PATRONISED, PERIPHERAL, PIONEERED and PARTNERED

## Activity

1. Explain that Peter Cadogan,<sup>13</sup> who developed the matrix used in this game, had a long career in the student movement. He was thinking about ways in which he could help students understand the relationship between a students' union and the college or university. The exercise has been adapted to focus on relationships at a national level.
2. On the floor of the meeting room create an axis using masking tape - you can ask the participants to do this. Using the attached Figure 17 explain that the Y axis (vertical) represents the amount of INVOLVEMENT (civil servant presence at meetings, legislation on student representation and so on) in the affairs of the NSO that a national body might have whilst the X axis (horizontal) represents the amount of SUPPORT the NSO receives (for example if it provides funds, office support, support in kind etc.)
3. Ask the participants to stand on the grid at the point they think the NSO is.
4. When they have done this ask each participant why they are standing where they are, then give an explanation of each quadrant using the notes in the box below.

This matrix illustrates the extent to which government or another national body involves itself in the affairs of the NSO, cross reference with the extent to which the national organisation 'supports' the activities of the NSO. There are four categories:

**Low involvement/Low support = PERIPHERAL** - the national body provides little or no support and has no interest in being involved; it views the NSO and student representation as marginal to its interests and purposes.

**Low involvement/High Support = PIONEERED** - the national body provides support but distances itself on the basis that the NSO provide a useful role but if they run into difficulty then they are on their own.

**High involvement/Low support = PATRONISED** - the national body takes a stance of minimising the perceived disbenefits and requires involvement out of all proportion to any support. NSOs can find themselves in this category especially if there is some kind of funding support given, or if the NSO has been established through national legislation. The reason behind it is often that the national body is nervous of what an autonomous and effective student-led NSO might mean or do.

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<sup>13</sup> Peter Cadogan 'Understanding the Students' Unions Key Relationships' Association of Managers in Students' Unions (UK), Agenda Magazine, October 2003 No 77.

**High involvement/High support = PARTNERED** - the national body listens to and respects the view of the NSO and will involve them in policy development. Where it works the interaction between the NSO and national bodies can provide a positive force for development. Of course any NSO needs to watch out that this relationship does not compromise the independent voice.

**Debrief**

5. Summarise by re-emphasising that the relationship between the NSO and any national body can change over time so we constantly have to work to be where we want to be.
6. Check with the participants that their NSO is where they want it to be - if it is not generating some ideas about what they can do to get where they want to be. If they are OK with their position then generate ideas on how they can maintain their position.
7. Note that in working out how to develop or maintain position they may want to revisit the previous exercise and then use the next one to develop a communications and engagement strategy with those people of influence who can help them to achieve their goals.
8. Thank the participants for taking part and move on to the next chosen exercise.

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Patronised	Partnership

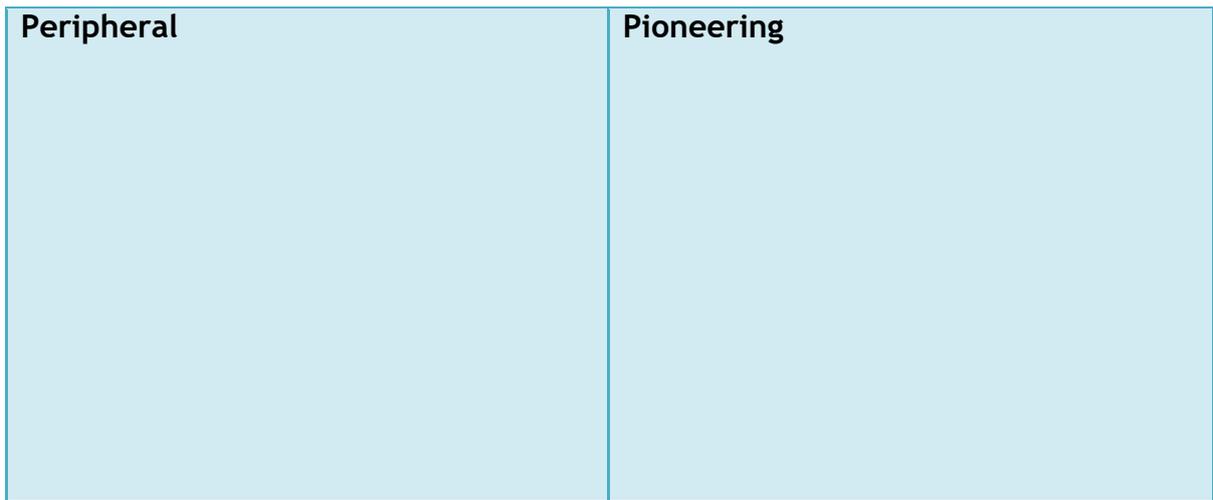


Figure 17: The Involvement/Support Grid

#### H4.3: EXERCISE - Developing a communications and engagement plan

Having identified the individuals and/or committees that you would need to influence then it is worth plotting them on the chart below.

Decisive decision making power or influence						
Active participation in decision making						
Taken into account						
Can get attention						
Not on radar						
	Die hard ally	Active supporter	Inclined toward	Inclined against	Active opponent	Die hard opponent

Along the bottom you have summary descriptions of the kind of support that you could expect to get from individuals or groups - from a diehard ally that will support you no matter what up to a diehard opponent who will take a lot to dislodge. Along the left-hand side there is a range of influence that these people can have, going from not on the radar of the issue you are interested in up to having a decisive role in the decision that you wish to influence. Plot the individuals and groups on the grid/chart - you will then need to decide how to approach those that you wish to influence. The chart allows you to see who should be prioritised - however it also might suggest who you need to persuade to get more involved. For example, if a diehard ally, someone who strongly supports you, does not have an issue on the radar but they could play a more decisive role, then you will need to develop a strategy to get them more engaged.

#### **SECTION SUMMARY**

Through engaging in discussions and taking part in the exercises in this section you will have evaluated a couple of approaches to policy development and developing policy-based work plans, and looked at approaches to influencing government policy and listed features of an influencing strategy. You will also have looked at ways of prioritising policy and finessing the message through communications plans; identified the importance of delivering change through campaigns with impact using a theory of change model that can mobilise student support; and learned about the importance of developing a partnership approach.

# I: Sustainability and Continuity

One of the key barriers to developing any student-led organisation, whether at a local or national level, is keeping the organisation going beyond the original motivation and vision of the founders. This section will look at ways in which the risks in this area can be minimised. It considers:

- Learning and development
- Training policy, plans, design and delivery
- Group dynamics
- Organising handovers
- Working with permanent staff

## I1: Learning and development

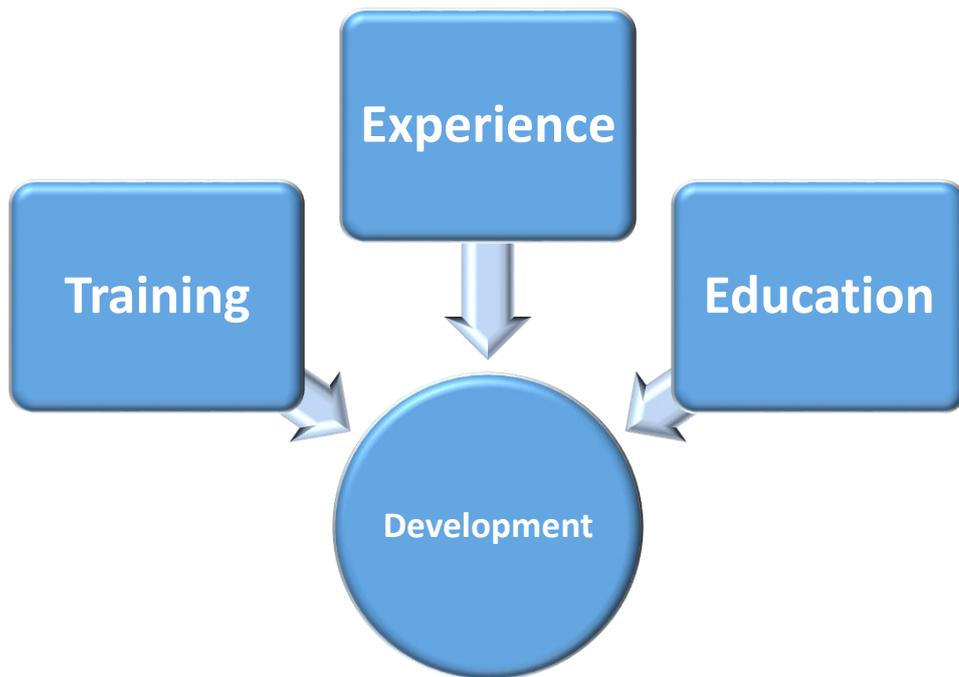
### I1.1 Training

The purpose of this section<sup>14</sup> is to give a basic introduction to the provision of training events for elected student officers. The approach taken is one that assumes that a national organisation will either be advising on, or directly involved in, delivering training opportunities both within the NSO and as part of the key services for members.

Training is used within organisations to improve the knowledge, skills and confidence of an individual who is required to carry out a particular job. It relates specifically to job requirements, unlike 'education' which has a wider perspective. Both education and training contribute to the overall development of an individual. Students' union officers are often only in office for a short period of time, training in this environment is vital.

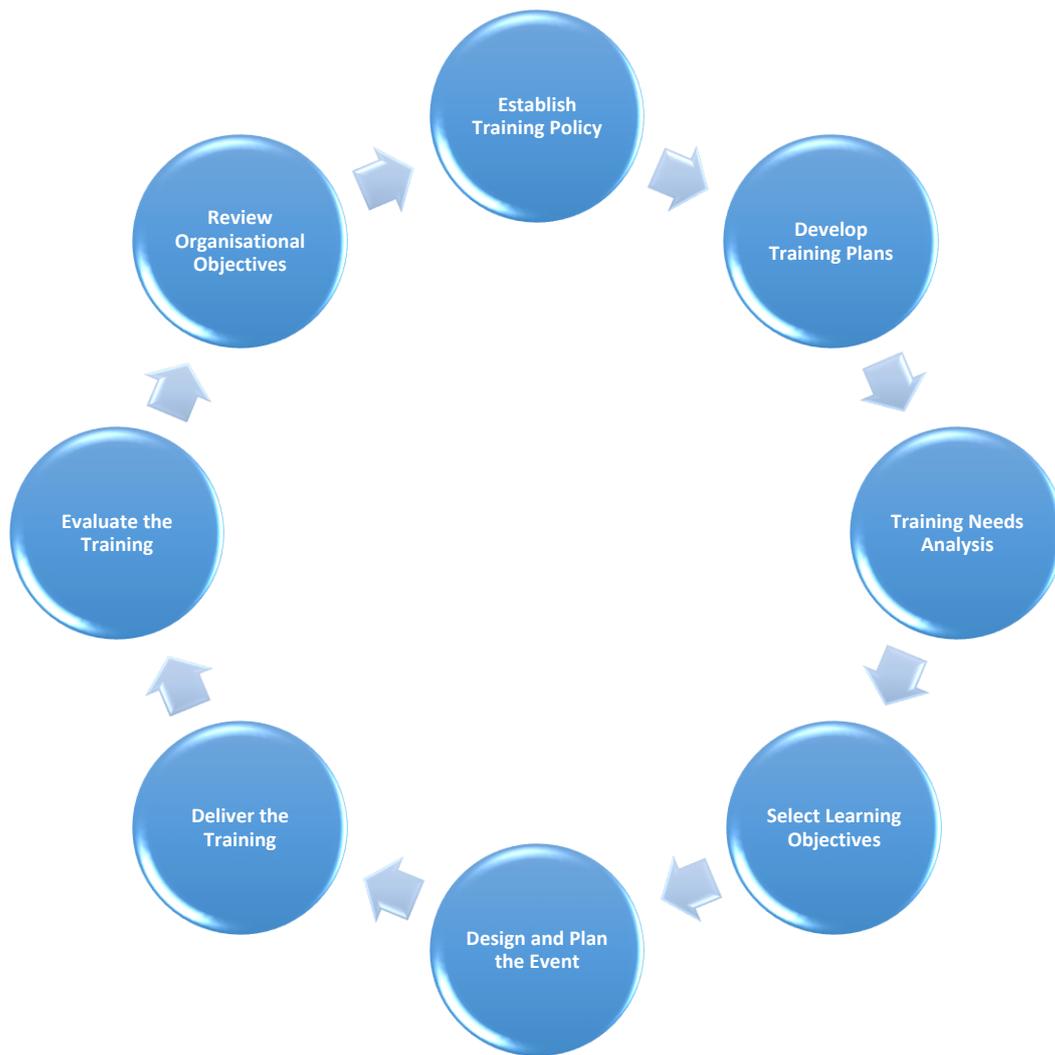
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<sup>14</sup> Adapted from Mike Day, 'Developing Quality Training in Students' Unions'. European Students Information Bureau 1993.



*Figure 18: Training, experience and education feed into the development of an individual*

Most organisations go through a cycle of training; this is depicted in Figure 19.



*Figure 19: The training cycle*

This section will give a short summary of each of the stages of the training cycle, and will introduce the major issues involved in establishing quality training in student unions.

## **11.2 Training policy**

A training policy is an important part of developing an overall approach to training provision. However you carry out your training there are implications for the resources of the organisation, both personnel and material. If the training programme is to be given proper support then developing such a programme will take resources from other activities. Most organisations will agree a policy to mount an information campaign, for example on third world debt, or to organise a special conference. Training needs a statement that is just as clear as those that might be issued for such activities. For example: ‘the training team seeks to provide high quality training for elected student officers. It will seek to develop the essential knowledge, skills and confidence to

enable them to carry out their jobs effectively'. In this example the NSO is indicating that they will seek to train elected officers within their member students' unions. At the same time the organisation is making a statement that this is an important area of work for the NSO.

### **I1.3 Training plan**

Whatever the original intentions, reality all too often intervenes to compromise the most progressive of policies. Training may be given a high level of importance within the budget of an organisation but even that expression of priority will not yield all the resources required. The training plan therefore needs to be a clear statement of what will be done bearing in mind the restrictions on resources. It is a statement of intention to develop the performance of people within an organisation, outlining objectives and the way in which those objectives will be achieved. The members of the NSO need to be given a clear explanation of what they can expect to receive. If you feel your NSO is not in a position to make provision at the moment, then build it into your longer-term plans.

### **I1.4 Training needs analysis**

This can be a very confusing area. There is a great temptation to assume that there is some infallible tool or process that if followed closely will reveal the training needs of an individual and an organisation. You will no doubt see numerous publications in bookshops and online on how to conduct a training needs analysis (TNA). Many of the available theories work very well when training people in a systematic process and they operate on the basis of filling the skills gap; for example, if a person needs to work a machine, these are the stages they need to go through to be able to do that, and their ability to work it can be assessed very easily. It is harder when dealing with interpersonal skills. You can of course monitor an employee's general attitude and demeanour over a period of time and identify what course they might benefit from.

Elected student officers present a different problem - it is hard to easily establish in what areas they need training. Equally, they may not know what it is they don't know or, more dangerously, believe that they do know it and attempts by a training team/service to put them through courses may be viewed with suspicion. A process whereby someone gets elected, sits down with a trainer, articulates their training needs and individually develops a programme of personal development is just not practical in the world of student unions. It is necessary to look for cost-effective, collective solutions to deal with the annual (or at least regular) turnover of officers. There are a number of sources/factors to bear in mind when coming to a decision on what training courses to provide:

- Post remits – what is it the elected officer is required to do?
- Opinions of SU support staff - what do any support staff, whether employed by the students' union or the institution, think the elected officers need to know?

- Opinions of outgoing officers - what do any outgoing officers wish they had known right at the start of their term of office?
- Government legislation - what's coming up over the next year that the elected officers will need to know about in relation to issues that will impact on students?

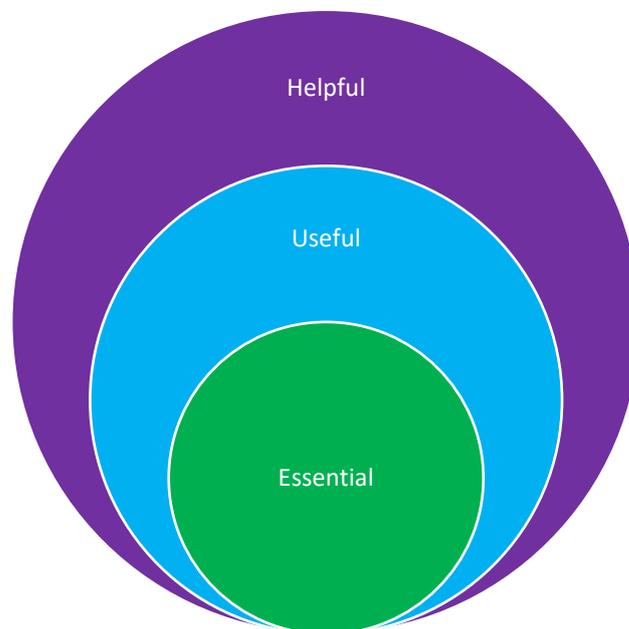
By a combination of judgement of past needs and review throughout the year a set of objectives can be drawn up for the year.

### 11.5 Designing the material

This can be time consuming, but once carried out and regularly reviewed can build into a useful resource for the student movement in your country. Equally there is a good deal of material available commercially that can either be used directly or adapted to meet your needs.

#### a. Lesson plans

The best lesson plans have at their core information that is essential, as well as information that is useful and helpful.



*Figure 20: Content of lesson plan*

- Essential information - represents the skills and knowledge that an elected officer absolutely must know, in effect things they cannot get away without knowing.
- Useful information - represents things that elected officers should know

- Helpful information - represents those things that elected officers could know if there was time in the programme

What you include in any training programme will be dictated by this hierarchy and, critically, the amount of time you have. Students will have other time commitments; they may well be volunteering their time for their students' union so making the best use of the time available is vital. It will all depend on how long you have people for and how much you need to cover. If you have a great deal to cover in two hours your options of delivering anything other than a workshop or lecture are severely restricted.

## **b. Learning styles**

We need to bear in mind when training student officers that are all coming from very different perspectives.

### The New Broom

There will be those who are new to student unions, who were trusted by the membership because of their previous lack of involvement. They may be of the new broom type that listens to no one in their attempts to rid the union of the 'clique', or they may be surprised that they won and be somewhat apprehensive, or they might know a bit but fully realise that there is much to be learnt.

### The Old Hand

There will be those who have been around a bit that know the procedures of the organisation and are clear as to why they are there. Some may be arrogant, but some will have an awareness of the scope of the job and the consequent need for training.

If training people from more than one student union there will be a variance in the level of resources and the traditions from institution to institution.

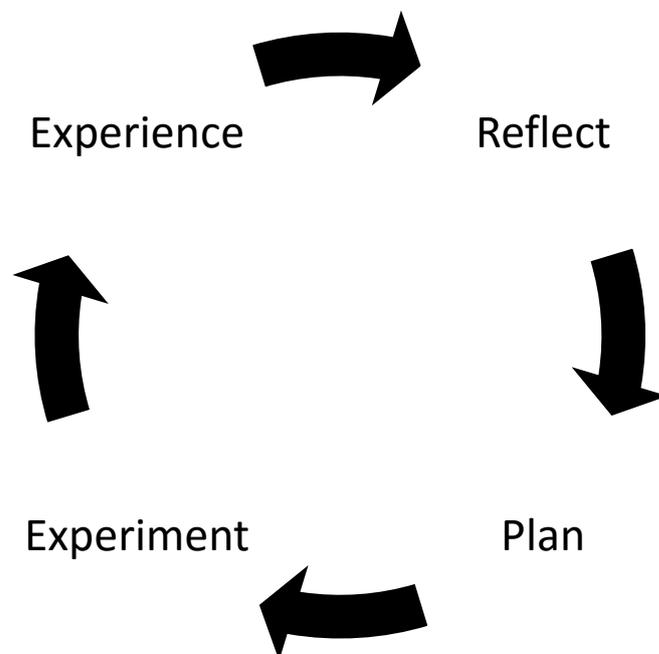
Individuals also have different learning styles: some will prefer lectures, some role play, some will like to be able to participate actively others may be less comfortable. All these variants need to be catered for by varying the manner and style of delivery of the event. A more active approach to learning can result in a greater understanding and more practical application of that which you wish people to learn.

## **c. Principles of learning**

There is no space in this section to cover the various theories of learning and motivation; however, there are some important ones that we need to bear in mind when designing material.

- People **learn at their own pace** - move too fast and you can leave people behind. Pacing an event so that everyone is on board at each stage is very important.
- People learn more if **each step is reinforced**. Have clear learning outcomes that are understood by the participants, go back to them at the end of the session and check understanding and keep repeating the key messages.
- People **learn what they do** - practical, active exercises such as role plays, simulations and case studies can help to base a programme in the reality of the students' union and the issues faced by students.
- People learn best when given **positive feedback**. Think of a young relative who draws a picture of you. It looks nothing like you, of course - but you heap praise upon them and tell them it is brilliant. If you didn't, the chances are that they would never pick up a pencil again. The same goes for student officers. Think of the 'types' we identified earlier (old hand and new broom). Officers get elected because they pledge to sort everything out, not because they are 'willing to learn'. Creating an atmosphere that allows officers to share experience and reflect on their own learning (and mistakes) is more effective than an environment where they can't share their learning.

Perhaps the easiest explanation of active learning is Kolb's learning cycle<sup>15</sup>.



<sup>15</sup> Kolb, D. A. (1984). 'Experiential learning: Experience as the source of learning and development' (Vol. 1).

### *Figure 21: Kolb's learning cycle*

As an example of Kolb's learning cycle in operation, imagine that an individual has the experience of standing up to make a speech to a group of students. After the speech they think about how it went, what was good and what they could have done better. Having gone through this process of self-analysis and reflection they can start to draw up a plan by trying different things. Training can create this kind of learning in a safe environment, enabling course participants to reflect on their simulated experience so that they are in a better position when they actually come to carry out a particular activity.

#### **d. Setting objectives**

Writing clear objectives is an essential part of reinforcing the learning and persuading people that the course or session is relevant to their needs. Objectives need to express what is to be done and what they will be able to do when they have finished and in what conditions. Objectives should be written in such a way as to allow the tutor or facilitator at the end of the course to remind people of what they have learnt. For example: 'By the end of the session you will be able to list the four stages of Kolb's learning cycle and apply it to your own training courses.'

#### **e. Training methods**

There are numerous methods you can choose; among the most common are:

##### Lecture

A talk given by a tutor who knows the subject to a group of students. This has low audience participation but can accommodate large numbers.

##### Reading

Covering key material as an individual can be done with a minimum input but requires a lot of concentration. If you do not have much time in which to put on a course, well-produced handouts can supplement the learning.

##### Demonstration

An expert shows you how it is done. This has quite a high participation rate (potentially).

### Structured discussion

Focus questions are put to a group; with a good facilitator the participation rate can be high.

### Panel discussion

A number of experts can be directly questioned, presenting a wide range of views or approaches. This allows people to either question or listen and, again, quite a large number of people can be involved.

### Brainstorming

A tutor asks people to shout out ideas on a particular subject, all of which are recorded on a flipchart. Everything should be written up without comment or evaluation; discussion takes place once the list is complete. You can also ask people to write things down on their own and then write them up. This helps to ensure everyone has something to contribute.

### Action mazes

This is a controlled exercise that is perfect for a small group. Participants are given a scenario and are asked to take a course of action; the consequences are then communicated to them. Learning comes from the structured discussion after the exercise.

### In-tray exercise

This is a practical exercise that can be carried out by an individual or a group. The participant is asked to look at typical materials that a job holder might come across and then indicate what action they might take. This is useful for prioritisation and time management exercises.

### Role play

An exercise in which participants and tutors take a role to try and learn about a hypothetical situation by acting out the situation. This is more suitable for small groups than larger ones. Some people can be uncomfortable with role play, so it is essential that you reassure people from the start. Point out that the situation is not 'real', but that much can be learnt from 'unreality'.

### Case study

This consists of detailed written material outlining a situation to which participants are asked to react. It has a very high participation level and is useful with small syndicate groups.

### Icebreakers

These are games and exercises that are designed to relax participants on a course. It is important to start a course with some form of icebreaker; it can speed along the group dynamics and help to get people working together.

## **f. Materials needed**

### Tutors' notes

Instructions to tutors as to what to do at each stage. Notes on what key points need to be got across. An idea of the sort of discussions that usually follow the exercise. List of equipment required.

### Worksheets

Should contain a clear explanation of what people are required to do. Any background information they need and an indication of timing of the exercise.

### Support materials

In the form of written information that people can take away and read. This is useful if you are unable to go into too much detail in certain areas.

## **g. Visual aids**

People receive information through one or more of their five senses. Most learning situations will involve sight and hearing, but some students with special needs will need other methods. Learning is quicker and more effective when two or more of the senses are involved. For this reason, audio-visual aids can be a useful tool. Reading can pass on some information, reading and hearing information even more, seeing information more again - leading ultimately to actual experience. The sort of equipment you can use includes:

## Flipchart

Useful for spontaneous work that needs to be kept. They are easy to use and economical. You can use old posters if the cost of the pad is prohibitive. They can be hard to write on quickly.

## Chalkboard

Useful for spontaneous work that does not need to be kept. They are economical once installed, but perhaps a little too reminiscent of the schoolroom.

## PowerPoint/Prezzie presentations

It is useful to have the main objectives and some of the key points of the presentation pre-prepared.

## Video

Useful for providing a different stimulus for the event. Here you can either use a camera to record the participants' activities, or use commercial videos that cover a particular subject. Filming the activities allows you to instantly recall an incident and give feedback in its context. If using existing videos, YouTube is a great source of short films.

### **h. Preparing for the training event**

The preparation for a training event is an essential part of any course. If materials, food, atmosphere and facilities are of a poor quality the effect on the success of the actual learning event can be disastrous. Your programme and materials could be of the highest quality and extremely relevant, but if you don't pay attention to the 'customer services' aspects of the programme then all your excellent design can unravel very quickly. Things to remember include:

- Define the aims and objectives of the course
- Agree how many course participants there will be
- Agree the time available
- Prepare a course programme and circulate it
- Allocate tasks and sessions to the team that are putting on the event
- Send out confirmation to participants
- Check the rooms you want to use are appropriate and book them
- Book any audio-visual equipment you may need
- Reproduce the materials
- Make sure you and other tutors are familiar with the materials
- Arrive well before the start time of the event and make sure everything is read

## **i. Facilitating the training event**

### **a. Group dynamics**

Much will depend on the style of the trainer. Some will prefer a highly structured and formal approach; others will be keener to try innovative techniques. A tutor needs to be enthusiastic, helpful, supportive, encouraging, and at different times will need to play different roles.<sup>16</sup>

#### Stage One

The group will have just come together, they may be apprehensive, the tutor will need to be very directional and intervene quite a bit.

#### Stage Two

As members of the group get to know each other there may be some tension and conflict. Again the tutor may need to intervene and help resolve the conflict. A discussion at the beginning of the course on 'ground rules' can help diffuse the situation.

#### Stage Three

Hopefully by this time the group will be working together; they will use the tutor as a resource but the need to intervene as much is no longer there. The tutor can withdraw from the room to allow participants to get on with things.

#### Stage Four

At the end of the course the tutor will need to become directional again, explaining future arrangements and making sure everything is pulled together.

As a general point anyone involved in training should take the time to read up on group dynamics.

### **b. Giving and receiving feedback**

As we saw in the list of principles of learning, effective feedback can greatly enhance the overall learning experience. Giving and receiving feedback are vital to the learning process. Feedback is more helpful if it is owned by the receiver - say 'I feel that you were angry at this point' not 'you were angry at this point'; remember it is only your opinion. Don't be too quick to correct or raise issues; timing is all important. Feedback must be specific and tied to behaviour. Encourage people to say how they felt they did; encourage self-analysis. When receiving feedback try and assume goodwill, ask for clarification, listen actively and don't try to justify yourself or you will enter into a cycle of hostility.

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<sup>16</sup> See Bruce Tuckman 'Developmental Sequence in Small Groups', Psychological Bulletin 1965, Vol. 63, No 6.

## **I1.6 Evaluation**

Evaluation is a process whereby you can reach a judgement about a course based on a variety of data. Initially of course you will want to seek the opinions of those who were on the course. Be careful: if it was a good event in social terms people may be on a 'high' and give you glowing feedback, furthermore they might be reluctant to be critical at the event. You need to be able assess what learning has taken place by observing how an individual goes about their task and how they use materials from the course. Effective training can improve the overall results and success of an organisation. Evaluation is important to the participants, the tutor and the student union. They will want to make sure that the objectives have been achieved and that the personnel are better able to carry out their tasks. The most common method is some form of questionnaire. These can be issued pre-course to assess levels of knowledge, immediately after the course and sometime after the course.

## **I2: The role of support staff**

Employing staff to support elected student officers is one of the ways an NSO can address issues around a lack of continuity. Working with elected officers requires some specific skills that recognise the principle of student-led organisations. There will be times when:

- Elected officers will require a '**civil service**' approach - they will want staff to research and present a range of options from which they can make a decision.
- Elected officers will require '**mentoring**' support in which staff who have developed experience in the student movement can help the personal development of the elected officer. There may be times when staff have to challenge a deeply held belief of an officer, recognising of course that the student leader may decide not to take the advice.

Both of these approaches are needed according to the situation, and hopefully in day-to-day work both elected officers and staff carry out the agreed tasks without infringing on each other's roles.

Below there are eight tips for developing effective professional relationships between elected officers and full-time staff.

### **1. Clear, defined roles**

Staff and officers need to fully understand each other's responsibilities and priorities. It is rare for only one thing to be happening at any one time! Student officers will be juggling meetings and campaigns and running an office, and staff often have other responsibilities alongside supporting the students' association such as enrichment, tutorials or roles within student services. As well as ensuring that job descriptions clearly outline who is responsible for what with regard to students' association activities, keep in mind that other events and responsibilities will also have to be taken into account.

### **2. Staff protocol**

Elected students are responsible for making decisions on policy and campaigns, and staff are employed for their skills and expertise to support the elected officers in their work. A staff protocol outlining this relationship and line of accountability can help to explain to others how NSO activity is organised. While the staff member may support and motivate individual officers or facilitate NSO activities, it is the officers who ultimately take responsibility for all NSO work. Developing a staff protocol, in conjunction with having defined roles for staff and officers, can help with the wider understanding of how everyone can work together.

### **3. Training**

Training and skill development is useful in any role. Elected officers should ensure there a comprehensive handover between executive committees as each new term begins to ensure NSO activity continues to develop. It is equally important for support staff to fully understand the student movement and the developments of students' unions and NSO members.

### **4. Networking and support**

One of the best aspects of the student movement is the desire to share best practice and experiences between the membership. Through networking days, online forums, national events and Facebook and many other opportunities, staff and students can regularly link up with others in a similar role. Whether you are new to the movement or have been involved for some time, students' unions and student representation are continually developing. Everyone is on a learning curve.

### **5. Communication**

It is very important for officers and support staff to meet and talk regularly. While staff and officers have different responsibilities, you are still working together as a team. As well as understanding each other's role, get to know everyone within the team. Find out why everyone got involved, what interests them and why they are passionate about the student movement. Keep in touch with each other throughout the week. Make an agreement to always check emails at least once a week, or to

have a dedicated time for NSO work. As a responsive team, it is important to be able to react quickly, with the support of the whole team behind you.

## **6. Planning events and activities**

There will be many occasions where officers and staff will be working together on events and projects. When planning any activity ensure it is clear who is going to take responsibility for what and, if necessary, divide up all activities and assign a person to each task. Don't take it for granted that the other person knows that something is their responsibility - they might think it is yours! Remember the point above regarding the multitude of responsibilities officers and staff have; work together as a team to make events and projects successful. There will also be work which officers must take responsibility for as the elected student leader, but where the skill and expertise of staff will be required to guide its completion (such as writing and delivering training, and managing finances). Be clear who is ultimately held accountable and what role each person has in the execution of these tasks. Support staff are not responsible for running the NSO, but it is important to acknowledge their role in facilitating and supporting the tasks and projects that officers undertake.

## **7. Accountability**

Students' associations operate within clear structures and are guided by embedded legislation and formalised rules. As well as an understanding of the individual roles of officers and staff, an understanding of the operation of an association as a whole is important. A students' association is a democratic organisation and, as such, mechanisms of accountability are built into the constitution to enable the membership to hold their elected leaders to account. The membership through student council (or equivalent) can call upon a 'vote of no confidence' to remove an officer from post if they deem his or her work to be unsatisfactory (see individual constitutions for the definition of 'unsatisfactory' and the stages of this process). Equally, staff are bound by a contract with the college to act professionally at all times, and if staff are not abiding by this contract, a complaint or disciplinary action may be called against them. In terms of a positive working relationship between officers and staff, it is important to understand that officers and staff are held to account through different mechanisms, but that both are committed to act responsibly and professionally in their roles.

## **8. Saying 'thank you'**

It is more likely that an individual will enjoy their work and, therefore, work harder if they feel that their effort is acknowledged and achievements celebrated. Take the time to acknowledge the team effort and simply say 'thank you' for the effort everyone makes - especially where it is not always obvious who has been involved in the work. You work hard together as a team, and therefore should share any achievements and celebration of this, together.

### 1.2.1: Staff roles

NSO staff play a multitude of different roles within their organisation, and have many different competing demands upon their time. Often this is not captured in their job descriptions!

#### *The Enabler*

Sometimes the role of staff is to help the officer to be better at what they do, rather than doing things for them.

#### *The Controller*

Sometimes, aspects of an NSO's activity require a level of responsibility which can't always be expected of an officer. One example is financial control.

#### *The Adviser*

Officers may need advice on how best to achieve their aims, perhaps also about navigating national structures and government departments. While this is in some sense 'political', it means staff need to have at least some understanding of all the officer's work, political or not.

#### *The Referee*

As opinionated and outspoken people elected because of their views, it's not surprising that officers often disagree with each other. But that can sometimes lead to a breakdown in the workings of the NSO as a whole, and sometimes someone has to step in. This is where the referee comes in.

#### *The Administrator*

Effective administration is essential to the running of a good NSO. Depending on how many staff your NSO employs, this may involve everything from setting strategy to managing diaries.

#### *The Expert*

Sometimes representation requires specialist knowledge. An education officer might need to know the difference between formative and summative assessment, and a welfare officer might need to know about the impact of college life on mental health. Staff will need to know these things too, or at least how to find out about them.

#### *The Disciplinarian*

If an officer isn't pulling their weight, or does something which damages the organisation as a whole, it can sometimes fall to staff to pull them up on it. This is one of the main areas of conflict between officers and staff.

### *The Coach*

Staff are often responsible for organising the induction of officers, and take some responsibility for the officers' development throughout the year.

### **I.3: Effective officer handover**

There are a number of ways that a new NSO can build a level of continuity into its activities: keeping accurate records, employing a staff team, making the case for the full-time elected officers and so on. The organisation may not be able to afford all of these, but whether you use them all or just some, it is absolutely vital that you put adequate procedures in place for one team to hand over to the next team. No matter what level of experience a newly elected officer has there is always much to learn: information about on-going influencing campaigns, the 'mood' of the membership, the state of the finances, administrative procedures and so on. They may not say it but new officers will be apprehensive and possibly unsure of their direction and place within the NSO. Many of them will be trained in the skills they need, and some of the key areas of knowledge, but the passing on of experience and the direction of the NSO can often be overlooked. By contrast, outgoing officers can leave their posts forgetting what they have achieved and learnt. Handovers are important for outgoing officers to reflect on their development and for newly elected officers to think about how they will use their year in office.

#### **I3.1: What is a handover?**

A handover period is designed to induct a new person into an organisation or situation, and allow for information and experiences to be passed from one officer to their successor. It often coincides with a period of training, but the two things are distinct. Training concentrates on the key skills and information that is needed to fulfil a task and make decisions. A Handover passes on experience and knowledge, so that those decisions can be made more easily and more wisely. Within most NSOs, officer handovers only take place between the two officers involved, however this can be problematic if the officers involved have different views, if the incumbent officer had supported another candidate, the important thing is to appeal to the greater good of the NSO especially in its early development! Other members of the NSO team will be involved in handover as will any staff or trustee support. There are many models and ideas that can be included but balance in the activities and approach is the key to a successful handover. If the handover is too long participants can lose interest, too short and not enough information and be passed on. Lots of team activities can be good for bonding together, but leave role specifics lacking. Before you begin your handover you'll need to think about this balance and the particular needs of the elect and outgoing officers

### 13.1.1: EXERCISE - Developing a handover programme

To help you develop a handover programme this exercise will help you chart the key plans and areas of work that officers-elect want to achieve and the experience they have already gained. The aim is to record the work that the outgoing officer has done, and get the officers-elect to think about the way they will use their skills. Each team (outgoing and incoming) should write complete the third column in the table below:

Officers-Elect		
What manifesto promises did you make?	Write down three main things you promised to do from your election manifesto	
Other goals?	Think about anything else you want to achieve with the year ahead that was not an election pledge	
Skills	What skills do you want to develop - how can being an officer help you in the future?	
Learning	Describe how you feel you learn best	
Motivation	Why did you decide to run for the position?	
Personal vision	Where do you want to be in a year's time? What's next for you?	

Outgoing Officer		
Manifesto	Which of your manifesto promises have you fulfilled? What would you have done differently?	
Other goals	What occurred over the past year that was not in your manifesto?	
Skills	What key skills have you learned or developed over the past year?	
Experiences	What are you most proud of over the past year? What challenges have you overcome?	
Personal Vision	Where do you want to be in a years' time? How will you use your skills and experience	

Hopefully having this information side by side will show both groups of elected officers the benefits of being in this position. It is suggested that the incoming officer can also keep their list as a reminder of how they've changed over their year in office. This exercise will start to tease out what areas of handover need to be concentrated on. If their election pledges are all to do with campaigning, then this can be focused upon. If they ran on a mandate to develop the NSO structures, you should look more closely at the governance of the organisation.

The next stage is to make a timetable that covers all the areas based on the information you have gleaned from the comparison exercise. Having a clear idea of timings is important so that everyone can plan the times they are available and prepare themselves adequately. It also makes sure the programme takes account of when people are available. Remember to take account of the priorities, needs and preferred learning style expressed by the incoming officer.

Develop a 'manual' or a collection of important documents with space for the incoming officer to make notes and record the key learning points. The idea can be developed to incorporate the entire year. If an officer keeps a record of what they have done and what they have learned from the experience it really helps to make sense of it at the end of the year and can support the future employability of the officer.

Next, try and organise the handover into core subject areas. NSOs can be exciting places and officers will have a wide range of opportunities to implement their manifesto pledges and make a difference. They will need to know about the processes they can use, the people they must persuade and the battles they need to win. The four main areas are:

- The role of the officer
- The national student organisation and its members
- The education sector/political situation they are working in
- Important partnerships.

We will look at each area in turn:

### The role of an officer

One of the hardest things to grasp is what role the officers themselves have and what is expected of them. They could be representing a particular faculty of students at an institution in the morning, meeting a government minister over lunch, discussing the future strategy of the organisation in the afternoon and giving out prizes at a volunteer awards ceremony in the evening, as well as discussing a campaign plan later on. The role falls into four main areas:

- Representative - this is where the officer acts as the voice of students
- Activist - this is where the officer is working for change and building student activism
- Trustee - this is where the officer is responsible for the oversight of the NSO, making sure it is compliant with its own rules and regulations
- Portfolio - this is where the officer is making sure they know about a specific area they have been given responsibility for.

Each of these roles will require a different set of skills and behaviours.

### **13.2: Elements of an effective handover**

Handover programmes can be divided into two main areas:

- The national student organisation and its membership
- Stakeholders and partners

#### The national student organisation and its members

The ethos of the NSO should strongly direct the work of the officers. They should have a strong awareness of the organisation's strategic plan, its mission, vision and values. This will help create a sense of purpose to the rest of the handover. You should also include any on-going projects you are part of. One activity that can help in understanding of the role of the NSO is to invite the incoming officer to match up what they hope to do with the strategic documents of the NSO; this helps to make the link and to make it real.

New officers will need to be confident with the way in which the NSO's democracy works, which meetings set policy, which meetings hold officers to account and how they can promote and champion these structures and get students involved. It can be really helpful if an officer attends some of the key constitutional meetings (if they are in a position to) before they take up office and/or shadow the person they are taking over from. Continual engagement of this sort allows information to emerge naturally and in context.

If you have been able to secure the resources for a staff team then the new officer needs to get to know them, but also to appreciate the differentiation of roles. Staff members will help deliver the policy of the NSO and advise student officers. Make sure the new officers meet the staff, have space to ask questions and get to understand the role that they play. This sort of intervention can be done through a presentation, lunch or a more formal handover meeting.

It is important that the officer elect is aware of the history and origins of the NSO; how it came into being, what challenges have been overcome, and what the next

steps are. Their role is to build upon the achievements of their predecessors. This helps to give context to the work that they will do.

Administration and compliance tasks are crucial. How do officers claim expenses, and if so how much? How do they make photocopies? What's in the budget? Who has keys to the office? What are the expectations in terms of time-keeping? What protocols are there (how to deal with the press for example).

### Introducing stakeholders

Newly elected officers will need to meet the main stakeholders that the NSO works with. They will need to be introduced to ministers, civil servants, political advisers, party leaders, local politicians, community leaders, trade unionists, youth leaders/organisations, journalists and key players in the education sector. This can be achieved through briefing notes and if feasible having the outgoing officer (probably the president) take their successor to a succession of meetings. A key focus for the meetings should be to outline the NSO's plans for the year ahead.

The arrival of a new elected team of officers needs to be fed to the press, and apart from meeting journalists and developing a working relationship with them it is worth issuing a press release outlining the key manifesto points and biographical information about the new officer team.

New officers will need to know what their diary holds for the year to come. There will be the formal meetings of the NSO itself but there will also be other conferences, events and regular meetings that they need to be aware of so that they can plan their time effectively. Any briefing should indicate the purpose of the meeting, who goes, where it reports to, what has happened in recent history and an estimate on how much time it takes to prepare, attend and follow up each meeting.

Your NSO will most probably be part of a network that may well be linked in with the Commonwealth Students' Association, apart from other regional student bodies. If feasible then arranging a visit to another NSO or a regional meeting will help the induction process as well as making sure that they are familiar with the support the CSA and its partners can give.

### **13.3: Some general tips for handover**

Here are some general tips for holding a successful handover:

- Induct, inform, enthuse and enjoy inducting new officers into the situation, informing them of all the basics they need, making them enthusiastic about the role and for both incoming and outgoing officers to enjoy the process. Don't lose sight of this!

- Plan, plan and plan ahead. It's easy to leave handover until its right on top of you. Forward planning and letting the elected officer know what's going on is really important. Ideally you should be preparing the review and planning handover from the very first day a new officer comes into post.
- Be accessible; make sure you're aware of any accessibility or religious needs your new officers may have and make this part of your programme.
- Be a controller of space and time; make sure you have enough time to cover everything you need and create space for the new officer to work, write and think. Clear an area of the office for them and make sure they feel involved.
- Clean the office and tidy it up before the new people start. Any personal files and emails, and information that is out of date should be cleaned out and relevant handover information should be clearly labelled.
- Organisations have a language of their own and lots of acronyms and abbreviations, it's helpful to produce a list so that new officers can get to grips with what people are referring to. Explain acronyms, phrases and terms as clearly as possible.
- Expect the unexpected! Handover isn't an end to the learning and development process. There will be things a new officer will pick up during the year, and information that they didn't know they need to know until the need becomes apparent. Keep a diary for the next officer so they have less unexpected things to deal with.

#### **13.4: Suggested information pack and materials for handover**

- A congratulations card and welcome letter
- An itinerary for the handover period
- Job description
- Brief job descriptions and contact list for key NSO staff members, officers and volunteers
- Organisational chart
- A copy of the new officers' manifesto promises
- A diary
- A calendar with key meetings written in
- A list of passwords to doors, computers, etc.
- Some instructions on using photocopiers and other office equipment
- A copy of the NSO's governing documents (usually its Constitution and Regulations)
- A list of policy passed and any outstanding mandates
- A copy of the NSO's strategic plan or development document
- A copy of the NSO's annual report and accounts
- A list of any on-going projects that the NSO may be part of, or major projects in the year ahead

- A copy of any institution regulations you may need (disciplinary, etc.)
- Brief role descriptions, background information and contact list for key stakeholders
- Briefings on current political issues and debates concerning students
- Contact details for officers in students' unions and any link you may have with the CSA and regional structures
- Copies of NSO publications
- Location and file protocols for your IT system.

#### **SECTION SUMMARY**

Through engaging in discussions and completing the exercises in this section you will have looked at approaches to organising learning and development, and creating training policy, plans, design and delivery, identified the key stages of group dynamics and generated some tips on organising handovers for elected officers. You will also have identified some issues around working with permanent staff

## **J: Capacity Building for the NSO**

The NSO, your member students' unions and the student movement as a whole will be very reliant on attracting and retaining volunteers. Almost all NSOs have developed from the voluntary effort of committed student leaders and activists. The next few sections contain some tips on ways in which you can demonstrate that you value the contribution that they make. In this section we will examine ways in which you can go about:

- Recruiting volunteers
- Motivating volunteers
- Looking after volunteers

### **J1: Recruiting volunteers**

Volunteers are vital to the development and future of your NSO: committed individuals who can do much to help to create the organisation and recruit/motivate new volunteers through their enthusiasm, commitment and leadership. Volunteers choose to do something, and not get paid for it. In order to generate involvement, you will need to encourage people to become volunteers. In this first part of the section we will discuss what attracts people to become a volunteer, what difficulties exist, and how they can be overcome.

## J1.1: Barriers to involvement

There are many barriers that prevent people from becoming involved.

### J1.1.1: EXERCISE - What prevents students from volunteering?

#### Activity

1. Begin by summarising some of the main points from the introduction to this section.
2. Ask members of the group what motivated them to get involved in the NSO.
3. Divide them into groups and ask them to identify what barriers may exist that prevent students from getting involved, and what might encourage them.

#### Debrief

4. Ask each group to summarise their discussions and record the key barriers and motivators on a flipchart.
5. Use the notes that are produced to generate the discussion.

Here are some common barriers to involvement and some practical ways to address them:

<b>Barrier</b>	<b>Ways to overcome</b>
Lack of time	<ul style="list-style-type: none"><li>• Explain benefit to personal skills</li><li>• Work with tutors and college / university to highlight importance to future employability</li></ul>
Lack of awareness of what's going on	<ul style="list-style-type: none"><li>• Produce and distribute opportunity profiles (see below)</li><li>• Think about new ways of promoting your activities and what you want students to do.</li></ul>
Don't feel they would be welcome	<ul style="list-style-type: none"><li>• Develop visible inclusive policies</li><li>• Run information sessions for specific groups of students especially those from disadvantaged groups</li></ul>
Unaware of costs / commitment / experience necessary, etc.	<ul style="list-style-type: none"><li>• Produce opportunity profiles</li><li>• Review promotion of activities</li></ul>
Unsure of whether it is for them	<ul style="list-style-type: none"><li>• Produce opportunity profiles</li></ul>

As we can see, one of the recurrent problems is that people may not know enough about what is on offer, where to find it, and what is involved. One way of providing information like this is in the form of an **opportunity profile**. The next section will focus on ways in which you can develop one.

## **J2: Opportunity profiles**

Opportunity profiles are helpful recruitment tools not only for volunteers but also for any elected officers who may receive some form of bursary, honorarium or payment. They can be designed to give a clear idea of what volunteering opportunities are on offer, and what each one entails. They are like a short job description. Instead of simply saying 'come on and get involved', they explain exactly how to do that, and what is involved. When constructing an opportunity profile, you should make sure that you answer the following questions:

### **What is the opportunity?**

What is the main purpose of the position? What will the volunteer be required to do over the year? Who else is on the committee or group?

### **Who can get involved?**

Can anybody do this or do the volunteers need particular skills or knowledge? Do they have to be a certain type of student? Do they have to be elected? Do they have to pay to become involved?

### **What commitments will I have to make?**

How much time do volunteers need to put in? Does the work involve unsociable hours? Do they have to attend meetings or write reports? Can they choose how much time to commit? What sorts of tasks are involved?

### **What will I get out of it?**

Why should they want to do it? List the knowledge and skills that people will develop. Don't forget to tell people that it will be fun and that they will meet new people! Link it to employability.

### **What support will be available?**

What support will the NSO provide? Is there any training in place?

### **Further opportunities**

What else might be on offer, either in the NSO or other jobs after they have left? What does the role set you up to do?

**Who should I contact?**

How can students find out more about this activity? Who should they contact? Can they go and talk to someone? What is their email address or telephone number?

**J2.1: EXERCISE - Developing an opportunity profile**

1. Having looked at the potential value of an opportunity profile you can, working in your groups, develop a set of profiles for the activities/roles you need the NSO to carry out.
2. Use the template below (copying it if required) to work on a set of profiles for your NSO.

<b>Opportunity profile template</b>
What is the name of the activity?
What is the main purpose of the activity?
What are the main tasks that are carried out by those involved?
What experience is required?
How much time will they have to commit?
How do they get the job?
What will they get out of it?

Where can they go for further information?

**Debrief**

3. Ask the participants to share the profiles they have developed - involve the group in refining them.
4. Discuss how and where you will circulate the profiles.

**J3: What motivates someone to get involved?**

People get involved for different reasons. There are four main motivations for people who become involved in student activities:

1. People who get involved for **achievement**
2. Those who desire **power**
3. Some will want to meet **people**
4. **Therapeutic** reasons may motivate some people

We will look at what key messages different types of volunteer want to see that would motivate them to get involved. Remember that different people may become involved in the same activity for different reasons. No one reason is superior to another; involvement is about doing what you want to do, and for whatever reason you want to do it. The table below lists some of the motivations for involvement and ways in which to tap into those motivations.

Why they become involved	Key messages to attract them
<p><b>1. Achievement volunteers</b></p> <ul style="list-style-type: none"> <li>- a desire for excellence</li> <li>- doing a good job</li> <li>- needing a sense of accomplishment</li> <li>- wanting to advance their career</li> <li>- they need feedback from others on their work and abilities</li> </ul> <p><b>2. Power volunteers</b></p> <p>Will become involved because they:</p> <ul style="list-style-type: none"> <li>- like to lead and give advice</li> <li>- want prestige and job status</li> <li>- enjoy influencing people and activities</li> <li>- like their ideas to predominate</li> </ul> <p><b>3. People volunteers</b></p> <ul style="list-style-type: none"> <li>- like doing things in groups</li> <li>- like to help other people</li> <li>- like to be popular</li> <li>- want to meet new people</li> </ul> <p><b>4. Therapy volunteers</b></p> <ul style="list-style-type: none"> <li>- if they have gone through an emotional crisis or are recovering from an illness</li> <li>- to get a new start in life through volunteering</li> </ul>	<ul style="list-style-type: none"> <li>- will be part of a system</li> <li>- may enhance their CV</li> <li>- may be formally recognised for their work</li> <li>- will see a result for their work</li> <li>- will feel personal achievement</li> </ul> <ul style="list-style-type: none"> <li>- can be influential</li> <li>- may be formally recognised for their work</li> <li>- have networking opportunities</li> <li>- can lead, not just participate</li> <li>- can be seen to make a difference</li> <li>- voice new ideas</li> </ul> <ul style="list-style-type: none"> <li>- will meet new people</li> <li>- need to be enthusiastic</li> <li>- will get results</li> <li>- there may be perks involved</li> <li>- they will be formally recognised</li> <li>- they have opportunities for personal development</li> </ul> <ul style="list-style-type: none"> <li>- meet new friends</li> <li>- gain confidence and skills</li> <li>- lots of support</li> </ul>

#### J4: Looking after your volunteers

We have already looked at the range of motivations that people may have to volunteer in the first place and identified some of the barriers they may face. It's also worth thinking about the following tips for dealing with volunteers:

- Identify and seek to understand their motives
- Be a good listener
- Do not be negative in your criticism and feedback
- If you have to be critical do it in private on a one-to-one basis
- If you want to congratulate someone, do it in public
- Be considerate
- Give people clear tasks and responsibilities to carry out
- Give credit where it is due - even if they oppose you
- Do not try to dominate - people work *with* you not *for* you
- Show an interest in people, what do they do apart from their NSO activities
- Suggestions and requests are better than orders; always give a reason why you need people to do something
- Do not conceal things unnecessarily - practise open government
- Remember student leaders 'set the tone' for the NSO
- Always emphasise the positive
- Be consistent
- Be enthusiastic and have confidence in your activists
- Seek the advice of your activists
- If you make a mistake admit it
- Allow everyone to have their say in meetings; don't 'carve them up'
- Often the people who have an idea are the best ones to carry it out
- Think before you speak or act
- Don't let moderate grousing upset you
- Always set goals - student leaders have to provide a direction for NSO work
- Give people a chance to take part in decisions, particularly those that affect them
- Let people know where they stand

### **J5: Supporting student activities**

As we have seen, a potential area of engagement by NSOs can be through supporting student activities. Students' unions, however large or small, are quite often engaged in a diverse range of work, activities and projects which enhance the overall student experience and help to build a stronger university or college community. The table below summarises just some of the activities a students' union may be supporting.

<ul style="list-style-type: none"><li>• Elected representation - executive committee, student council or class representatives</li><li>• Entertainments and services for other members</li><li>• Shops for other members</li><li>• Providing advice on being at college or university</li><li>• A welfare or advice service</li><li>• Running campaigns locally and nationally</li><li>• Running a society</li><li>• Class or college trips</li><li>• Sports clubs</li><li>• Debating</li><li>• Theatre groups</li></ul>	<ul style="list-style-type: none"><li>• Welcome weeks, fresher's and re-fresher's weeks</li><li>• Student tutoring and mentoring</li><li>• Babysitting services</li><li>• Nightline - overnight advice and counselling support</li><li>• student newsletter, newspaper or magazine</li><li>• Student radio or television</li><li>• Student Community Action / community volunteering</li><li>• Employing staff, student staff and interns</li><li>• Involvement with their NSO</li><li>• Collecting money for charity</li><li>• Marketing their services</li><li>• Training other students</li></ul>
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What is common to all of them is that they are run by students, for students, and are typically overseen or funded by students' unions. These activities are usually totally reliant on students giving up their time and supported by their students' union, in turn the SU itself may rely on generic support from its own NSO as part of nationwide capacity building activity.

### **J6: Why student involvement is important**

Student involvement is important to students, students' unions, the college/ university, and, beyond that the wider community.

#### *Importance to the student volunteers themselves*

- Opportunity to try new things they are interested in
- Opportunity to acquire key life skills which can be used when applying for jobs
- Opportunities to meet new people and make friends
- They will develop transferable skills which will enhance their employability
- More likely to understand the students' union and the NSO

### *Importance to the wider student body*

Lets them know that the students' union is run for students and by students

- Makes it easier for students to access the students' unions if their friends and peers are involved

### *Importance to students' union*

- Vibrant student activities should be a key part of any students' association
- Involvement of large numbers of students can be used as a bargaining tool for a larger block grant
- Increased involvement in activities is likely to lead to increased involvement in elections
- The association will provide more of a student-centred service
- Greater involvement helps to provide a better service through feedback and engagement
- More people means more skills, more ideas and more enthusiasm
- Staff and sabbaticals are freed up to perform other duties

### *Importance to college or university*

- Vibrant opportunities are a key tool for institutions to recruit new students
- Having taken part in student activities means that graduates are more employable
- Successful student activities and high student involvement are excellent publicity for the institution
- It has been suggested that ex-students who have been involved the students' association donate more money to their institution's alumni funds
- Improves the image of the institution in the local community

#### **SECTION SUMMARY**

Through engaging the discussions and the exercises in this section you will have looked at ways to recruit, motivate and retain volunteers.

## K. Conclusion

The purpose of this toolkit is to bring together a range of tried and tested advice, guidance and active exercises that it is hoped can facilitate the development of national student organisations where they do not currently exist. The materials can also be used by existing NSOs to engage in developmental work. The toolkit sessions enable participants to discuss and clarify why they want to create an NSO and, crucially, what differences and changes it will bring about for students' organisations, higher education and wider society. It facilitates discussion on who would form part of the NSO and what its purpose, vision, mission and values are; how it will be governed, how it will be financed, how the membership will be engaged and how student leaders and volunteers will be supported; and finally how the organisation can be sustainable going forward.

Engaging students in decisions about their education and issues that impact on their lives is a crucial part of building democratic societies where everyone plays their full part as a citizen. Values of equality, democracy and collectivism do not stop at our borders; building student organisations that are in turn linked to those in other countries will strengthen the student voice that will need to be heard in an increasingly globalised education system that will cut across borders and that will be trans-national. Beyond the curriculum, students as future citizens of the world will know that organisations cannot act in isolation from global issues and that they will be limited in their ability to make change if there is no collaboration. Students and NSOs have much to contribute and gain by working with others; no single organisation can hope to bring about lasting change without collaborating. Greater global connectivity should be used to share and learn from each other. An NSO's ability to drive change and shape the future needs to be applied at both a national and international level and it is hoped that this toolkit will provide resources to make this a reality. NSOs and student leaders want students to thrive wherever they study and they will work with their members to champion student causes, supporting fellow students who are subject to injustice. NSOs will stand in solidarity with those experiencing repression and act as champions of human rights.

The issues faced by students are similar wherever they live. By building NSOs and collaborating we can make the case for increased investment in education, and we can promote student mobility and transferable qualifications. We can ensure that students are involved as partners in quality assurance processes and in the future development of tertiary education at a local, national and international level. Beyond the curriculum we can work together to develop sustainable behaviours among students because many of the environmental challenges we face can only be addressed through international co-operation. We believe that through engaging students in this way we will help foster in them progressive values on peace, social justice, sustainability and education, developing 'global citizens' who will seek to

forge a better world and who will champion such approaches in their future lives and careers. If, through participation in their NSO, the leaders of the future are inspired to approach global issues in a collective and collaborative way then NSOs will have played and will continue to play a part in bringing about positive and progressive change. All students have the power to transform the world.

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<https://www.obessu.org/resources/news/3-2-1-the-new-manual-for-school-students-is-online/> - the link takes you to their very useful organising manual

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## L. Worksheets

This section contains worksheets taken from the toolkit that can easily be copied and used in capacity building sessions.

Poster: Digby Jacks quote on representation

Worksheet: Analysing membership models

Handout: The scope of a National Student Organisation

Worksheet: Democratic models

Arnstein's Ladder of Participation

Worksheet: Deciding on a funding model

Worksheet: Developing a marketing plan

Worksheet: Segmenting student communities

Worksheet: Layers of oppression

Handout: Policy debate option

Handout: Theory of Change model

Worksheet: Developing a handover programme

Worksheet: Developing an opportunity profile



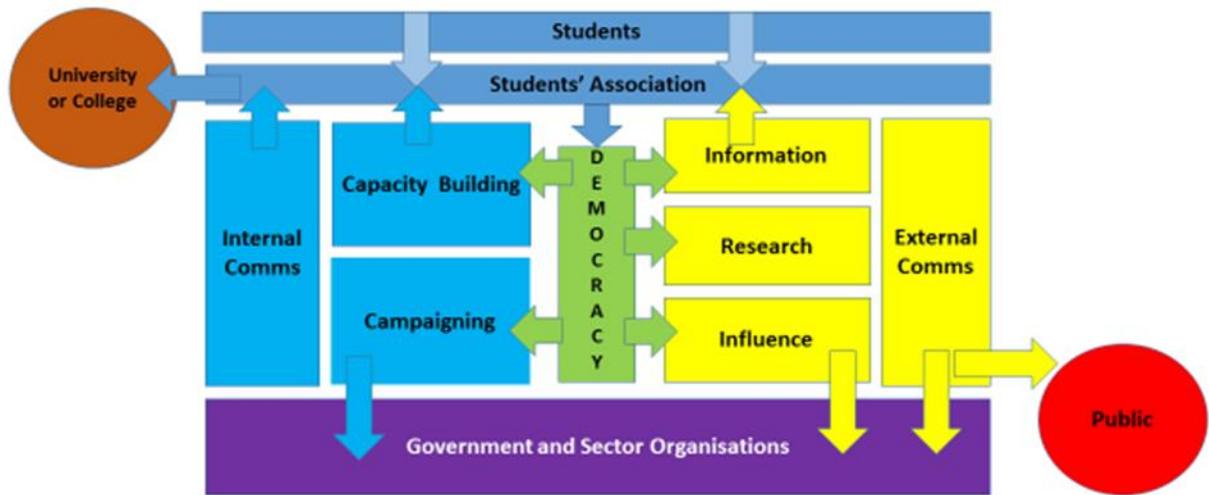
*‘Representation must never be seen, except in strategic and practical terms, as an end in itself. Too many union officers see it as a question of communication and merely sitting on the appropriate committee. The purpose of representation is to secure education and social change’*

Digby Jacks - NUSUK President 1971-1973

## Analysing Membership Models

Model	Pros	Cons
Students are voluntary members of their own students' union		
Students are automatic members of their own students' union		
Students' unions are voluntary members of a national students' organisation		
Students' unions are automatic members of a national students' organisation		
Individual students are voluntary members of their national students' organisations		
Individual students are automatic members of their national students' organisation		

# The Scope of a National Student Organisation



# Democratic Models

## Activist Model

Democracy is all part of the political process - it is not a passive process - people should make their own decisions through their active involvement in some sort of issue (e.g. a campaign). Activist democracy needs to have a clear leadership who are quickly accountable to its rank and file, it does not have high regard for formal structures and to be effective it relies heavily on spontaneity.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

### *Example:*

## Consumerist Model

Most people only get involved if they are unhappy with what is happening, people only attend meetings and actively participate in an organisation's politics and decision-making if the organisation isn't working well. If on the other hand everything works well and everyone is probably happy with the leadership there is no real motivation to get involved, for example shareholders rarely attend the annual general meeting of companies if the company is doing well and making a profit. In many respects apathy can end up being the

product of a well-run organisation. Formal structures are important to consumerism and if things go wrong people should be able to become involved and put the organisation back on the 'right tracks'.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

**Example:**

### **Conflict Model**

For a democratic organisation to be lively, active and participatory it depends upon the 'dynamic' of disagreement, argument and debate. Conflict is healthy if it stops the leadership of an organisation from becoming complacent. Organised conflict e.g. through caucuses etc. help to maintain the accountability of leadership and at the end of the day the well-being of the organisation.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5

**Example:**

### **Consensus Model**

For an organisation to work and be effective it is necessary that it adopts policies and plans that everyone can support. The role of the leadership of the organisation is to work towards the lowest common denominator and filter out disagreements, clashes, conflict by putting forward positions and strategies which it feels everyone should be able to give general support to.

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**Example:**

### **Participative model**

Democracy is all about giving people the power and right to make decisions which affect them. Central to participative democracy is the view that decisions are best made by the people most affected by them rather than by remote bodies.

Decision-making forums should be accessible, decentralised and flexible; the role of the leadership is to encourage people to participate in making decisions and coordinate the whole process.

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**Example:**

## Arnstein's Ladder of Participation



## Deciding on a Funding Model

Method	Advantages	Disadvantages
Charge fees from individual student members		
Charge fees from students' union members		
Seek support from the University/College sector		
Seek support from the Ministry of Education and/or Youth		
Generate funds through commercial activities		
Generate funds through sponsorship		

## **Developing a Marketing Plan**

*Complete the form below and think about how you will promote the new NSO.*

## **Developing a market plan**

### **Product**

What is the activity under consideration?

What particular needs does it satisfy?

### **Place**

Where will people go to engage in the activity?

Where do students need to go to find out about the activity?

Are there access issues for disabled students, students at other sites or part-time students?

### **Physical**

What is the physical environment in which the activity will take place?

Consider the impact of the environment on all five senses.

### **Price**

How much money does the NSO have to spend on this activity?

What costs will there be to student representatives who undertake this activity?

**Promotion**

List the ways in which you intend to promote the activity?

How will you target students who have previously not been involved?

**Process**

What are the stages that a student must go through in order to get involved in this activity?

What information is available to students about this process?

**People**

What qualities do people require to be involved?

What experience will they have?

What training will be provided?

How much time will they need to devote to the activity?

What groups do you wish to target specifically? Do you wish to target any specific groups (e.g. those who are not currently involved, or those studying a particular course)? How will you reach these people?

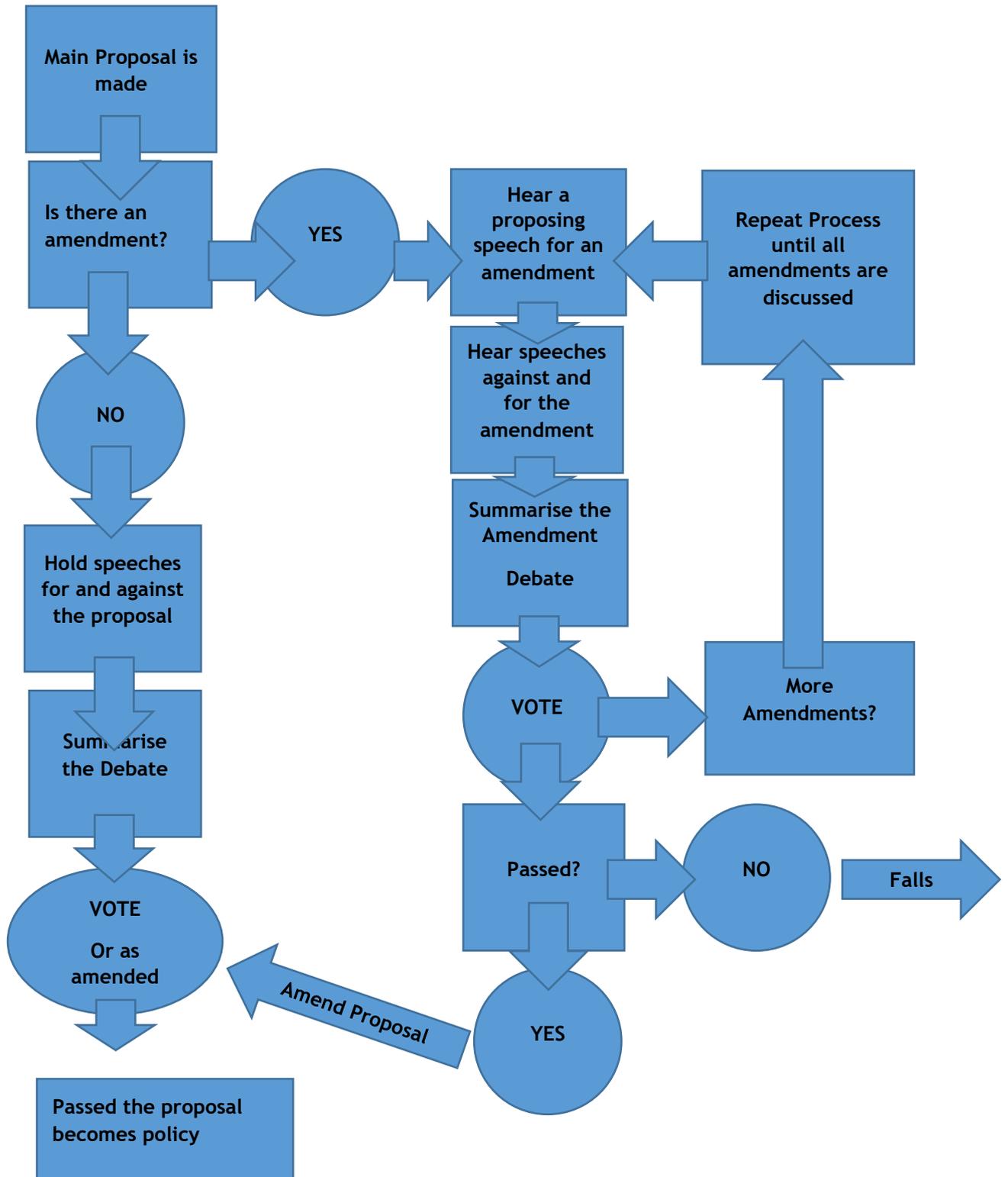
## Segmenting student communities

Segment	Who is most likely to get involved?	Who is least likely to get involved?
Student communities formed around shared interests <ul style="list-style-type: none"> <li>• Sporting groups</li> <li>• Political groups</li> <li>• Hobby/activity groups</li> </ul>		
Student communities formed around a shared location <ul style="list-style-type: none"> <li>• Students on a specific campus</li> <li>• Students in a specific city, town or village</li> <li>• Students at different institutions (some may be more prestigious than others)</li> <li>• Students based in an urban environment</li> <li>• Students based in a rural environment</li> </ul>		
Student communities based on administrative procedures <ul style="list-style-type: none"> <li>• Student year groups</li> <li>• Undergraduates</li> <li>• Postgraduates</li> <li>• International students</li> </ul>		
Student communities with a shared identity <ul style="list-style-type: none"> <li>• Disabled students</li> <li>• Ethnic minority students</li> <li>• Students with a shared (different) language and culture</li> <li>• Female students</li> <li>• Other groups</li> </ul>		
Do you have any other segments you think you need to add?		

## Layers of oppression

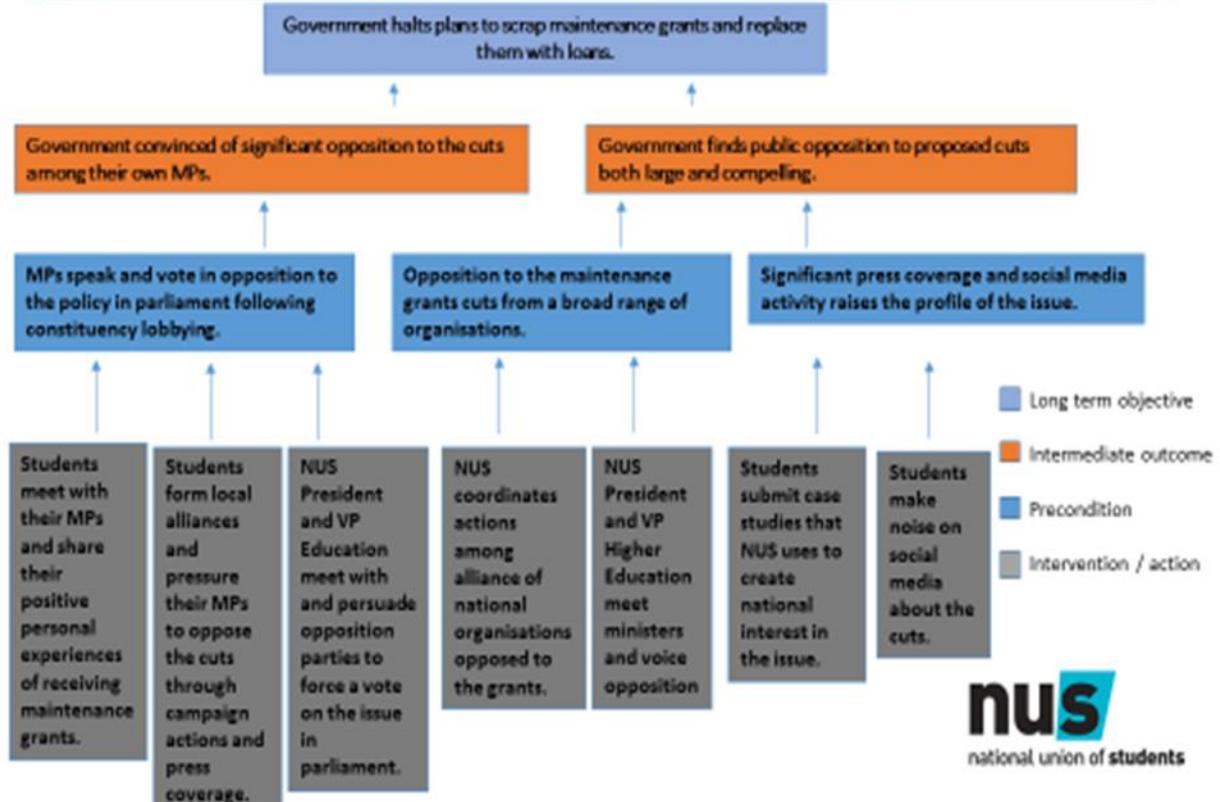
Layer	Example	Comments
<p><b>Institutional oppression</b> occurs when society gives privilege to one group at the expense of another through the use of language, media, religion, economics and laws</p>	<p>When a person watches TV and sees one ethnic/racial group as actors, news presenters and talk show hosts</p>	
<p><b>Community oppression</b> is oppression that one experiences within a community to which the student belongs</p>	<p>A local newspaper singles out an immigrant community, international students as the cause of a local problem</p>	
<p><b>Group oppression</b> is the oppression a student may feel as part of a wider group of students</p>	<p>A group of student friends make plans to take a trip as a group without recognising that one member of the group is unable to take part</p>	
<p><b>Individual oppression</b> occurs between students in one-to-one reactions</p>	<p>A landlord refuses to let a flat to a student on the grounds of their race, gender or sexual orientation</p>	
<p><b>Internalised oppression</b> is the process by which students who are the targets of oppression begin to believe the prejudices that are held about them.</p>	<p>A deaf man think he deserves to be treated poorly because he is a deaf man.</p>	

# Policy debate option



# Theory of Change Model

## Maintenance grants theory of change



## Developing a handover programme

Officers Elect		
What manifesto promises did you make?	Write down three main things you promised to do from your election manifesto	
Other goals?	Think about anything else you want to achieve with the year ahead that was not an election pledge	
Skills	What skills do you want to develop - how can being an officer help you in the future?	
Learning	Describe how you feel you learn best	
Motivation	Why did you decide to run for the position?	
Personal vision	Where do you want to be in a year's time? What's next for you?	

**Outgoing Officer**

Manifesto	Which of your manifesto promises have you fulfilled? What would you have done differently?	
Other goals	What occurred over the past year that was not in your manifesto?	
Skills	What key skills have you learned or developed over the past year?	
Experiences	What are you most proud of over the past year? What challenges have you overcome?	
Personal vision	Where do you want to be in a year's time? How will you use your skills and experience	

## Developing an opportunity profile

<b>Opportunity profile template</b>
What is the name of the activity?
What is the main purpose of the activity?
What are the main tasks that are carried out by those involved?
What experience is required?
How much time will they have to commit?
How do they get the job?
What will they get out of it?
Where can they go for further information?

## **M. List of figures**

*Figure 1: The scope of a national student organisation*

*Figure 2: Contributing information for an NSO Strategic Report*

*Figure 3: The four aspects of representation*

*Figure 4: The Public Sphere model*

*Figure 5: Three core areas of a student organisation's performance*

*Figure 6: The ladder of participation*

*Figure 7: Layers of oppression*

*Figure 8: The cycle of oppression*

*Figure 9: Policy debating process (option one)*

*Figure 10: Factors that can impact on the work of an NSO*

*Figure 11: The student journey and the NSO*

*Figure 12: Relationship between plan and responsibility*

*Figure 13: The impact chain*

*Figure 14: Example theory of change model - NUSUK maintenance grants campaign*

*Figure 15: The Apathy Staircase*

*Figure 16: The Stakeholder Analysis Grid*

*Figure 17: The Involvement/Support Grid*

*Figure 18: Training, experience and education feed into the development of an individual*

*Figure 19: The training cycle*

*Figure 20: Content of lesson plan*

*Figure 21: Kolb's learning cycle*

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