AGENDA

amsu

the association for managers in students' unions

07

INSIDE

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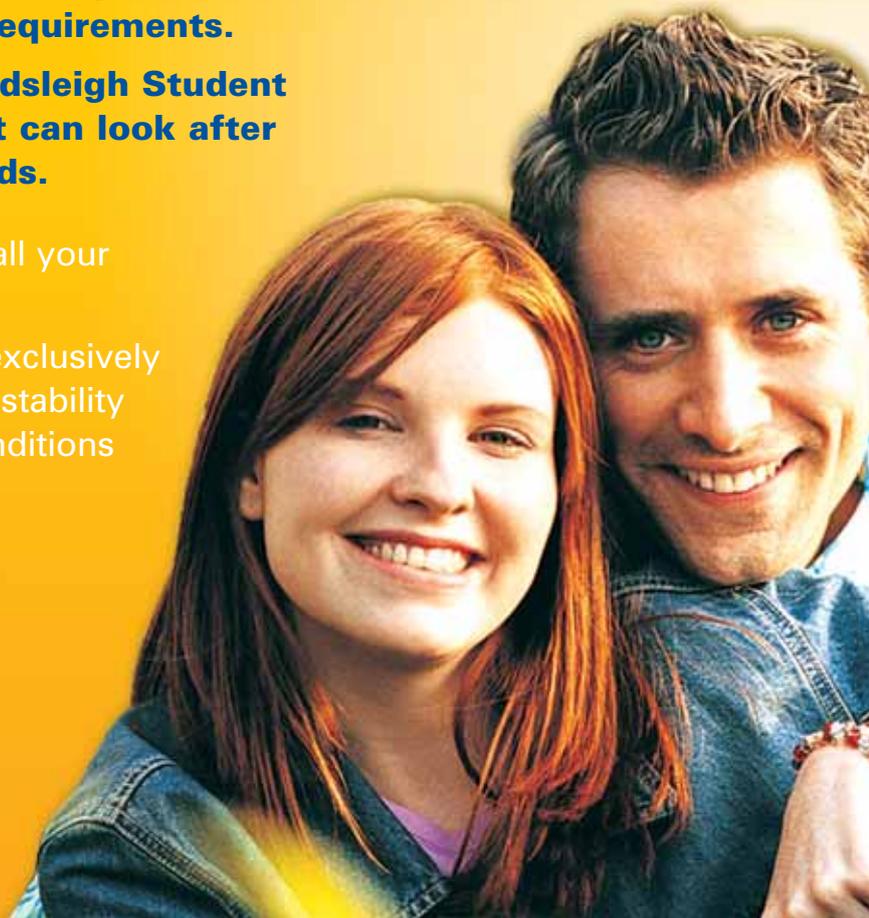## BUSINESS
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Contents

The AMSU strategic review

Author: Mark Grayling

AMSU Chair

AMSU is currently undertaking a strategic review. In this article AMSU chair mark Grayling provides some of the background to this process.
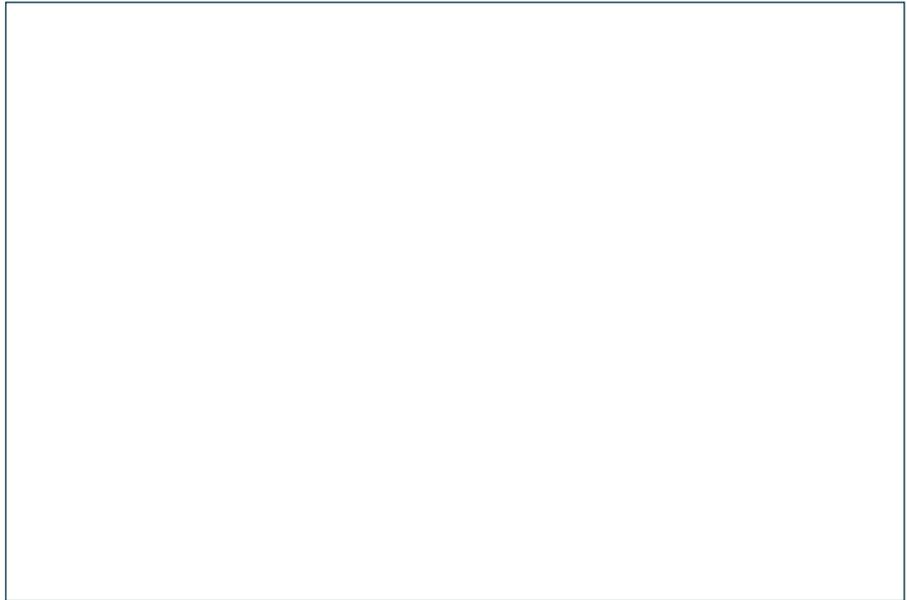
Introduction

The most recent AMSU strategic plan matrix was drafted and adopted in 2002 and has helped the Co-ordinating Committee and permanent staff steer the development of the organisation from that point to the present day. The plan has been reviewed and updated a couple of times, however this has not been undertaken in any depth since 2004 and an examination of the document leads one to believe that a more fundamental look is now required.

The current plan was used the EFQM Business Excellence Model for AMSU at a time when a number of member Unions were also trying to apply this approach. The experience of working with this approach has been problematic and even simpler versions, such as Business Excellence Through Action (BETA), have proven to be time consuming and bureaucratic. In addition the Students' Union Excellence Initiative (SUEi) has now been developed as a sector specific tool.

An overhaul of AMSU strategy is overdue and Coordinating Committee and Lead Volunteers were asked to consider what to do in the summer of 2006. However, the consensus was that a more fundamental review was needed before adopting a new strategy became meaningful. So with that in mind, we are undertaking a year-long review to find out what the people involved in AMSU, and those who are not but might be, think of the organisation, expect from the organisation and want from the organisation.

Students Union Surveys have undertaken the initial consultation so that those of us with a vested interest in the status quo do not get in the way of potential change right at the start of the process! A report on the initial phase was presented to Co-ordinating Committee toward the end of 2006 and the findings will be used to shape the second phase with the aim to conclude the process in time for the Annual General Meeting at Conference in Loughborough in July 2007.

Collaboration

Perhaps the most enduring element of the old strategic plan has been to fully establish a collaborative approach to the way AMSU works. Member Unions have also been encouraged to collaborate, as a result, although there may well be much further to go in order to fully benefit from this extension of a collectivist approach.

Examples of the way AMSU has embraced collaboration include;

- The creation of space on CoCo for BUSA, ACEVO and SVE in addition to the established involvement of NUS and NUS Services Ltd.

- The "transfer" of WiSCV to SVE.

- Co-operation with NUS, ACUI and NUS Services in organising annual conference in 2003, 2005 and 2006 respectively.

- Joint work with NUS and BWB on governance issues and the process that will lead to new charity law on the statute book.

- The Seminar series with high quality external input and jointly organised with NUS and NUS Services Ltd.

- Back office support, workstation space and access to meeting space for AMSU at NUS Services Ltd. premises in Macclesfield

- Discounted access to ACEVO for senior managers.

- Support on health and safety matters via the British Safety Council.

- The planned delegation to ACUI Region 1 Conference in New England supported by Horwarth, Clark, Whitehill.
- Finance seminars sponsored by HCW.
- AMSU Training courses provided by NUS.
- The SUEi project in conjunction with Di Boston and John Windle.
- The senior managers masterclass programme also provided by Di Boston and John Windle.
- The long-standing arrangement to produce the AMSU/NUS annual survey of member Unions with much of the work undertaken by the Peacocks.
- Website support via Uniservity.
- The production side of Agenda handled by NUS Services Ltd.
- The continued close relationship with Endsleigh.
- EMSU working closely with NUSSL Ents
- Regular meetings between the National Director of NUS, the CEO of NUS Services Ltd. and the AMSU Chair.

That all this development can be viewed as successful is testament to the strategic approach adopted in 2002 but is it the right approach for the future?

The changing environment

In the period to 2012, and looking beyond the new legal compliance required by Charities legislation, the following factors and/or events will be amongst those that impact on the UK Students Union movement;

- The imminence of a dramatic demographic change with a steep fall in the number of 18-25 year olds a certainty from the turn of the decade.
- The 2012 Olympics, which brings the biggest volunteering opportunity ever to the UK and this just at the point where demographic change occurs!
- The NUS activist revival should start to impact from 2009 in terms of those SU members reaching the point where they are likely to stand for/take elected office.
- The increasing importance of IT when we have reached a point where our own website may well need greater support along with the prospect of ever changing and new platforms for communication.
- The speed at which behaviours change amongst SU members, in particular their use of virtual worlds via IT, makes the speed at which we make decisions look clunky. Is there a new democratic paradigm where more decisions are delegated/devolved but informed by principles and using fewer meetings. New processes and new forms of accountability?
- At least one General Election with a change of Government now more of a possibility and a change of Prime Minister announced in advance as a minimum.
- The increasing importance of both the diversity agenda and the work that it demands.
- Changes to the pattern of study and University provision that may well follow the further commodification of HE under the new funding regime.
- The political battle over the fee cap in the run up to 2010.
- The development of NUS Extra and the consequences that may flow from the level of new income achieved for the National Union in particular.
- Changes in SU governance and the new framework of regulation for charities from 2007.
- An older age profile amongst the UK workforce.
- The Prime Ministers Initiative (PMI) II in relation to attracting more international students to the UK.

All these, and others not listed, will bring threats and opportunities for our member organisations and their collective membership. In addition it might help clarify the role that AMSU plays in support of Unions by considering the following;

- The balance of support for new managers, career managers and senior managers.
- The best way in which support is provided for professional specialists such as finance, HR, retailing, licensed trade, advice services, volunteer management either by AMSU or in conjunction with appropriate partner organisations.
- The optimum balance of volunteer support in AMSU.
- The role of CoCo and succession planning given the, entirely appropriate, limitation on how many years office may be occupied.
- The developing relationships with both NUS and NUS Services Ltd. particularly in relation to the wider public agenda as it impacts on SU's.
- The developing relationship with organisations beyond the SU movement.
- New opportunities for collaboration (with SOLACE for instance).
- Resource planning and the deployment of staff.
- The implications of full cost recovery.
- The desirability and possibility of new income streams.

It is hoped that as many people as possible take part in the review so that we end up with an organisation and strategy that is of value to both our member Unions and to the staff who work in the movement. The latest news about the review can be found on the AMSU website www.amsu.net/.

NUS National President on the diversity challenge for Students' Unions, Colleges & Universities & society as a whole
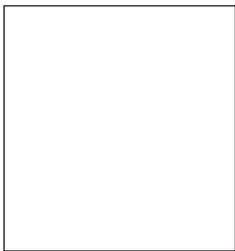
Author: Gemma Tumeltey
NUS President

As Mark Grayling highlights in his article in this edition in regard to the AMSU strategic review, one of the aspect which has seen significant change in the student movement at a national level is the extent and impact of collaboration between national student organisations (AMSU, NUS & NUSSL). This has been reflected in the joint seminar programme for Senior Managers and Presidents and Agenda magazine has also printed several articles from NUS NEC members on a range of topics. This article is the text of a speech delivered by NUS national President, Gemma Tummelty, to the November AMSU/NUS/NUSSL seminar regarding diversity and equality issues. In this she talks about whey equality is at least as important and relevant to the world of students unions and how the emerging diversity agenda offers a challenge to Students' Unions themselves as well as to education and society as a whole.

Good afternoon everyone, and let me first say how happy I am to be here opening this joint AMSU-NUS-NUSSL seminar. I'm genuinely excited about this event- I certainly think it's long overdue, and I hope it's going to be thought provoking, challenging and give us the inspiration to change our organisations for the better.

And let me start, if that's OK, with the change I want to see in my own organisation. For those of you who've not been to one of these before, the speech from the NUS president is usually the one where General Managers in the room hear General Managers not in the room get a kicking for all their faults. It's also usually the speech from the President where NUS tells unions to practice what NUS can't or doesn't preach.

Well, I can't say in all honesty that I agreed with every decision Kat ever made- and I daresay some of you didn't either- but I do want to say that I want the journey towards a more open and diverse student movement to be one we embark on together, rather than one apparently imposed by a less than perfect NUS.

As you know I'm just back from our National Demonstration- 15,000 students, 3000 placards (at least I think it was that way around) on the streets of the capital. It might not be the most up to date of techniques in NUS' campaigns arsenal, but the diversity of students on that event- standing up for what they believe in, united in their passion for a fairer system, was a joy to behold and a genuinely proud moment.

And I do think that to some extent, NUS has a good story to tell on campaigning for equality and celebrating diversity. It is not unusual as the guardian the recently pointed out to see women stand for president, and win, to see openly gay speakers stand on out platform at our events and make speeches, and the range of expressive religious diversity in NUS is now so strong that it has become a source of political debate in our movement rather than a novelty.

Last year our movement saw more black students become leaders of their students' unions than ever before, saw our disabled students campaign challenge, and defeat, the government on the damaging and regressive mental health bill, saw women students stand up and speak out against the disgrace that is the gender pay gap and our movement has stood strong whilst some continue to take the attacks of 7/7 as an opportunity to attack and oppress Muslim students on our campuses. More on that later.

But it's not just the campaigning work. We know that involvement in the mainstream of students' unions transforms their lives, and nowhere is it more transformative than student

involvement in the day to day work of NUS' liberation committee's, conferences and training events.

Remember it was NUS that popularised the use of the word chair rather than the word chairman in the 1980's, remember it was NUS that elected a black president back in the 1970's, and it is NUS that year after year, day after day are supporting people in their struggle for liberation.

But it's also true to say, that like so many hobby horse arguments in the student movement, we've often been faced with a false choice when we look at liberation. I started life in the Student Movement as a women's officer. And from my first week 5 years ago, right through to last week, people have invited me to choose between liberation, and equality of opportunity. Between liberation officers, and equal opportunities officers. Between celebrating autonomous diversity and championing integrated equal opportunities policies.

So I do want to be clear the outset of this event, that I think the choice is false. We don't make that choice in education. We don't say "either the Vice Chancellor should care about students or students should care about themselves through their students' union". And we all know, certainly respect and mostly champion the right of students to self organise, self determine and speak on behalf of each other. We know that when students speak up for themselves, punch above their weight and challenge power they learn, and their universities get better, and society gets better too.

And that is why I am proud to lead an organisation that also respects the right of disabled students to speak on behalf of each other, for women students to fight inequality, for black students to overcome oppression and yes, for lesbian, gay, and bi-sexual students to make their own decisions, have their own

policy, set their priorities with our unwavering support.

We recognise that not every union runs every liberation campaign, we know that sometimes it is hard to sustain womens groups, and we know its a challenge to support your LGBT activists to run their society, and we know that it is struggle to encourage people to put themselves forward for disabled students officer and its not to say that that those of you who don't or can't are somehow racist, sexist, homophobic or disablist- and it's certainly not to say that those campaigns should devour all of our resources- but it is to say that involvement in those campaigns by officers, reps and ordinary students is transformative both on them and on education and society as a whole, and is made all the more significant and powerful when you support that work locally.

" We know that involvement in the mainstream of students' unions transforms their lives, and nowhere is it more transformative than student involvement in the day to day work of NUS' liberation committee's, conferences and training events."
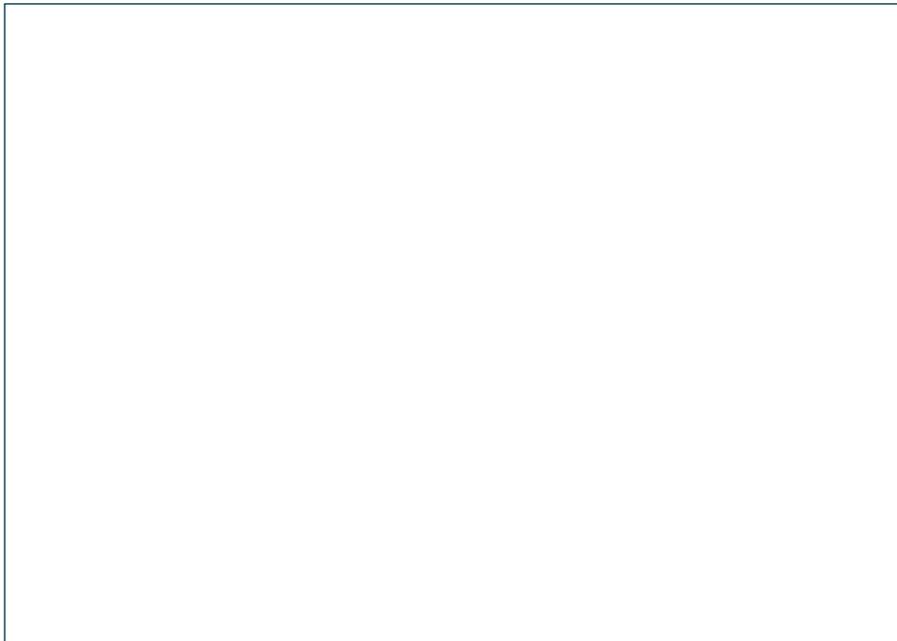
But enough, for now, on liberation.

As you know, NUS has a vision about an education funding system that is free and fair for all. A system where students can study what they want, where they want. A system that is radically different from the status quo where students are forced to pick the college that matches their bank balance - or where they don't get to study the course they want, as it's closing.

This is a vision that NUS' liberation campaigns share. We know that education is the key to lifting people out of poverty, to raise life chances and expectations, the first steps on a road to social inclusion and prosperity for all, not just the rich, well-educated elite.

But at the moment, that vision is not being given a chance. I began my time in the Student Movement as a Women's Officer. Not an equalities officer or a diversity rep but a women's officer. So let me dwell for a moment on some of the issues I think women face both in

society and in our movement.

Take a look at the gender statistics for your institution. I can pretty much guarantee you that the majority of students doing arts, social sciences and humanities are women. Then look at science, engineering and technology. The majority of these students will be men.

And this goes on at every level. At school, when young women see their careers advisors, they are all too often encouraged to go into childcare or hairdressing. But their brothers and boyfriends are told about mechanics and construction! Small wonder that 97% of students doing Modern Apprenticeships in engineering are men - and that 97% of students doing childcare are women.

And then you get to university, where you discover that the same inequality continues. From sexual harassment, to being told that women shouldn't be doing "men's subjects", to women being marked down because there is no

anonymous marking system.

And if you are a woman with caring responsibilities… Well, good luck! Childcare on campus (or even in the local community!) is rarely available to every student family who needs it - not that you'll know how many student parents are at your institution because no-one has to collate the figures! So next time lectures are scheduled at 7pm - or reading week is cancelled - or a department relocates or closes down, ask yourself how you would cope with one or more children to look after when childcare costs the earth and even if you've got the cash, there aren't any spaces anyway…

And then, of course, there is everyone's favourite… Fees, hardship, debt.

It's bad enough as a student struggling to put food on the table or buy the textbooks you need for your course. But let's think about what happens after graduation.

We know that women are paid less than men - whether through occupational segregation (childcare pays a lot less than engineering), direct discrimination, and of course, those so-called "career breaks" if we want children.

But being paid less then men for doing the same job doesn't mean that our debts are any less or that we get a "gender pay gap tax credit"! All it means is that the burden of debt takes longer to pay off, gaining more and more interest each day, leaving us with even less money to pay the rent - let alone take out a mortgage or invest in a desperately-needed pension!

And we know that debt is a deterrent for anyone who might want to go to university but doesn't know where the cash is coming from. NUS research shows that young women are more likely to be put off from going to

university because of debt than men - and that's before we start looking at ethnic groups or social backgrounds.

How is this fair?

How can we have a system which advantages the Haves and continues to exclude the Have-nots who are, in case you're wondering, the majority of the population?

NUS's work will not be done until every who wants to access education, can access education. Gender should not be a deciding factor in education choices. The fact that it is - from the course we study, to how long it takes us to pay off our debts, or whether we study at all - clearly demonstrates that women are excluded from achieving their academic potential.

But it's not just in education that I know we all want to see change. I'll get in before anyone else uses these headline examples. 72% of this year's HE Union Presidents are men. But on our best guess this year, just 38% of Welfare Officers are men. And have a think for a moment about the sexuality of those men. Your guesses are probably right.

And that's why whilst I think we have much to be proud of, we do have so much work to do yet. We are in danger of reinforcing stereotypes in our own organisations- the very ones that make a real difference now and in the future- and it's why we have a moral and political duty to never rest until our elected leaders reflect the breadth of diversity in our student membership. And that is also why I'm so pleased that the Diversity Action Working Group are driving this agenda forward to ensure that Students Unions are also tackling the issues of staff reflecting that same diversity.

I'm so excited about this range of work. The inspiring women events- top marks.

This seminar- at last. Launching diversity champions- long overdue.

I am- I'll say it again- so excited about what we'll do over the next couple of days and in the months ahead. We all have much to learn from the excellent range of speakers, plenaries and workshops- and I want our participation and the tone of the event to reflect those shared goals, and an atmosphere of tolerance and respect for each other as we learn together how to make our organisations as open as possible.

As I said before this seminar is long overdue – today is the deadline to respond to HEFCE's single equalities scheme. It has offered the sector a real challenge which Student Unions can lead and ensure that it becomes an absolute priority for their Institutions. This is not about "burden management" as HEFCE describe, this is about Higher Education finally starting to reflect the diverse make up of our society allowing us positive opportunities to celebrate and engage with Widening Participation.

I have spoken before about the challenges of student involvement, apathy and politicisation. How do we engage such a diverse range of individuals, with such a complete range of needs and desires? How do we speak to people, many of whom dismiss the students' union as irrelevant to their study in higher education, in a way that offers more than consuming beer in our bars? How do we increase participation when we ask people to attend meetings with agendas focussing on the union's internal affairs like who will staff the safety bus rather than their education or their society?

Well, let me close this opening by focussing on two things- one immediate, and one long term.

Right here in the UK, Isocs are now

> " Take a look at the gender statistics for your institution. I can pretty much guarantee you that the majority of students doing arts, social sciences and humanities are women".

under considerable suspicion. Over the past few months a whole host of stories have appeared in the media about them being "extremist" groups. Sensational headlines and stories in the wake of the incidents of the past month have repeatedly used the term extremist. We must all understand, and say clearly: this represents the most appalling racial and religious prejudice, and it must not be allowed to go unchallenged.

But worse, recent leaked guidelines to universities, called for lecturers to spy on "asian looking students", pitting staff against student and student against student. Well this is hardly going to help cohesion, and inclusion on our campuses and we have to be on our guard to protect and include our muslim members. We are lucky that we have UCU and UUK on our side on this one – joining us to fight this macarythite climate of fear and suspicion that will only serve to isolate further our Isocs rather than create an atmosphere of trust and unity that is needed to defeat terrorism.

We all have something to fear from this obscene generalisation. Who will be next? I'm worried that just as other rights have been removed under the guise of preventing terrorism that the right for students to self organise on campus will once again be under threat.
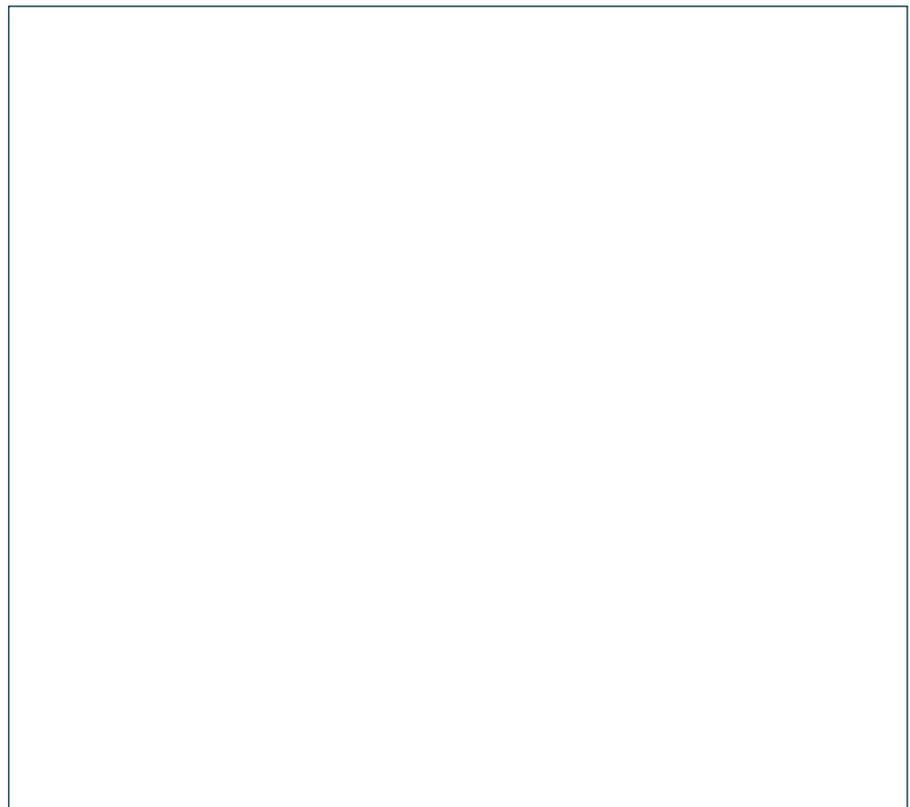
Demonising all Muslim students as extremists jeopardises and threatens the very diversity of which our educational community is becoming so proud- and it's up to us all to protect it.

But I also want to leave you at the start of this event with a wider thought.

When students' unions were initially established the population of higher education was predominately white middle to upper class males. The aims, objectives, structures and values that informed the creation of students' unions were a reflection of those white middle class men. But times have changed- the student population is no longer homogenous, it's difficult to define the archetypal 'student'- and look. Even a girl from an Ex-Poly can be President of NUS these days.

'Student' does and will increasingly mean someone who is female, someone from a black and minority ethnic community, someone who began their course in their late 20's and above, someone who is disabled, someone who has worked, who has grown up and lives in the community where they study, someone who already has a system of support networks and social activities in place before they enter higher education.

And that diversity means real challenges. It means that people pick and choose their politics, their identity, their motivation for education. It means that Union Council might be ideal for some but deathly dull for others. It means above all that if we're serious about embracing diversity, we need to work every hour of every day at accepting and celebrating difference.

Too often- and I do mean NUS as well- we close down on debate, stitch up discussion and try to fit people into our unions. My view is that the challenge for the future is to open it up- make us comfortable with difference, diversity and debate, and fit our unions and their opportunities, their values and their power around our members. We have to recognize that equality is not yet the norm and that a level playing field of opportunity needs to be actively created.

Maybe that's about changing structures. Maybe it's about changing behaviour. Maybe it's about changing fixtures and fittings, or leaders and language. Maybe it's about focussing on enabling activity rather than providing services. Over the next two days we can work together to find out.

Thank you, and have a great event.

AMSU passed policy on diversity in Students' Unions in 2005 and since then has had a working group on this issue. Their work has included holding the seminar where this speech was first delivered in November 2006. You can find out more about the working group via www.amsu.net/... and the all of the presentations from the seminar are available to view and download at www.amsu.net/.

The Ashes 2006

Author: Ian King
Chief Executive of NUS Services Ltd

In Agenda 85 (p15-18) Matt Hyde wrote about the lessons that UK Students' Unions could possibly learn from Australian Students' Unions especially in regard to fees and their impact and at the 2006 AMSU Annual General Meeting a policy was passed to enable that to happen. However, as Ian King, Chief Executive of NUS Services Ltd, reports there is another reason why UK Unions should take heed of lessons from down under.

Introduction

The paths and fortunes of Australia and UK Higher Education have been very similar since the early 1990s, we are now to hope that that is where it ends since, as a result of Federal legislation in November 2005, Australian unions have all but ceased to exist. UK unions beware!

Background

Throughout the 1980s and into the 1990s, UK unions were hounded by the Thatcher and then the Major governments, with the threat that UK unions would become 'opt-in' and voluntary rather than 'opt-out'. This action emanated from a total ignorance of the working of unions promoted by Conservative politicians who were seeking revenge for bad (losing) experiences as students' union activists.

In the event, good sense prevailed in the UK and settled on the Higher Education Act 1994 which imposed some limited constraints but within which students' unions have been able to survive leading up to the Charities Act 2006.

In 1994 a similar attempt was made in Australia through VSU (Voluntary Students' Unions) legislation promoted by the same sort of people for identical reasons. The overall intention failed but VSU, introduced state by state, compelled universities to charge a second fee for non-academic services (mainly the union). This necessarily committed most unions to a 'dollar chase' to ensure that commercial revenues were successfully collected in order to 'shore up' non commercial activities.

Throughout the 1990s Australian HE was ahead of the UK in the promotion of:-

- Tuition fees
- Student loans
- Mass entry HE
- Internationalising/commercialising HE

Many unions found themselves 'service providers' as their role and need to generate revenues increased. That, in conjunction with the tradition of Australian students typically not being campus based or studying away from home, plus the 'clock on, clock off' culture of educational access changed the face of Australia HE/FE.

Where are we now?

In November 2005, the Federal Government abolished the ability to charge students any fee (for services) other than the tuition fee. This was passed by one vote. This has taken $160m (or £60m) out of the system, resulting in 700 job losses and the effective disappearance of the students' unions (certainly the student experience) apart from the older more traditional universities of Sydney and Melbourne even here the union is severely truncated.

For example, at RMIT Union in Melbourne, I attended Trevor White's farewell party occasioned by his redundancy:-

- $12m reserves seized by the university.
- 200 plus staff made redundant
- Student government all but abandoned.
- Student support reduced from $7.1m to $1.3m.
- The union left only with sport
- All other services have been contracted out or managed by the university staff.

We need to be on alert for any repetitions (although we have already seen a number of takeovers!) news travels fast and the destruction of unions has occurred in less than twelve months.

Our protection is, I think:-

- To be good (measurably) and focussed.
- To be relevant to students (in a representative capacity)
- To be regarded by universities to be a key part of their recruitment and retention programmes

In the light of his grim experiences, our old friend, Trevor White, is working on programmes committed to making unions 'future proof'. NUS Services have secured his services for a half day workshop at our Annual Convention at the Adelphi Hotel, Liverpool on the afternoon of Tuesday, 3 April 2007.

Financial reporting under the Charity Act 2006

Author: Jon Berg
AMSU Treasurer and
General Manager of the
University of Teesside Students' Union

Jon Berg, is a qualified accountant, General Manager at the University of Teesside Students' Union and Treasurer of AMSU. He has written previously about issues of financial reporting and specifically the impact of the Charities Act upon Students' Unions in this respect (Agenda 83 p18-19 & Agenda 84 p12-15). Here he provides an overview of the requirements involved.

Introduction

Students' unions have long been recognised as charities due to their link to the educational role of their parent institution. However they were exempted from registration with the Charity Commission and equivalent bodies until the Charity Act 2006. Now students' unions will be directly regulated and must comply with the charity framework, guidance notes and reporting requirements. There are differences across the United Kingdom however my emphasis on England and the Charity Commission will yield some general pointers.

The financial systems and reporting requirements are set down in regulations detailed in previous articles (bibl – Berg, J.), the key being the 2005 Statement of Recommended Practice for Charity Reporting. This is compulsory for all but the smallest charities may require significant changes in the preparation and formatting of a students' union's annual accounts. The Statement of Financial Activities (SOFA) is very different to the profit and loss account and income and expenditure account many students' unions have presented. In fact it is different in many ways to the SOFA required by the previous charity reporting SORP. The other challenge is the Trustees Report as it requires considerable details about the structure and strategy of the students' union, with reporting of objectives and outcomes. It is far more than a narrative to accompany the accounts.

In the 2005/06 AMSU/NUS Survey 50 of 82 students' unions confirmed that their annual accounts included a statement of financial activities. Many adopted SORP 2005 in their 2006 year end accounts and examples are available from the AMSU online resource library. These may be more helpful than referring directly to the SORP or to the charity reports on the Charity Commission website.

For students' unions which do not yet publish charity accounts which comply with SORP 2005, it is essential to prepare for this year end. The 2007 year end accounts will probably need to be submitted in the students' union's first annual charity return following registration. As the format is quite different to the traditional income and expenditure or profit and loss accounts, it is highly recommended that a SOFA is prepared using 2006 year end figures or mid year figures for 2007. This will allow officers,

> " Take a look at the gender statistics for your institution. I can pretty much guarantee you that the majority of students doing arts, social sciences and humanities are women".

ordinary members, employees, and the parent institution to become familiar with the new layout of the accounts.

The identification of risks is an important requirement for charities. The trustee report must state that the trustees have identified the significant risks affecting the charity and have taken steps to manage these risks. In most cases this is achieved with a Risk Register, however only 31 of the students' unions in the 2005/06 AMSU/NUS Survey confirmed that they had a Risk Register. This is a cause for concern but the benefits of preparing a Risk Register are well worth the hours of work involved. It will not only identify the major threats to the students' union but will enable clear action to be taken and can be reviewed annually.

For further information see:

- Agenda 83 p18-19
- Agenda 84 p12-15
- NUS / AMSU on governance in association with Bates Wells Braithwaite (avialble form AMSU website or from NUS
- HCW seminar series held Autumn 2006

Cross ref to BWB report on governance and the role of trustees.

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eVoting Recounted

Author: Bryan Taylor
IT and Site Manager at Kings College London Students' Union (KCLS)

Many Students' Unions are undergoing Governance Reform and everywhere there is talk of new structures and Agenda magazine has tried to lead and reflect these debates over the last 3 years. However, another aspect of this debate is how to engage better with a bigger, more diverse and time poor student population. One technique is greater use of computer-based technology including for voting in Union elections. This subject was covered by Colin Wood in Agenda 84 (p26-9) and here Bryan Taylor, IT and Site Manager at Kings College London Students' Union (KCLSU), writes about their experience of e-voting.

KCLSU pondered electronic voting for a while before moving to a fully-fledged system this year. Several factors came together to allow our successful adoption of eVoting. The purpose of this article is to demonstrate the importance of these factors and then to get a little technical, better to allow colleagues to talk the talk with IT types in their parent institutions, and with suppliers of voting software.

Hopefully readers will find themselves better informed to implement electronic voting themselves.

The central issue to consider when implementing electronic voting is participation; chiefly we had fears of complicating the voting process and, put simply, making elections less fun.

Elections are quite an event: from hustings, through the antics of campaigning to the act of voting itself. The students' union election is many members' first encounter with a ballot box, and as such many colleagues show understandable reticence in putting the boxes and bunting away, abandoning the iconic image of casting a ballot in secret among the cacophony of competing candidates.

At KCLSU we decided that the act of sending staff out with laptops should involve as much hullabaloo as possible – rosettes, posters, bunting and flyers advertising the method, times and benefits of voting were deployed with abandon. Simply advertising the election and leaving members to vote in their own time by adding links to the KCLSU website and Institution web pages were insufficient, we felt, to ensuring a good turnout and a convincing members' endorsement of their union's leaders. 'Roadshows' were organized across the sites, near to libraries, cafeterias, outside major lecture theatres and such: in the land of the emancipated, footfall is key.

The period of voting was a contentious issue; election fatigue was cited as a reason to make the experience fairly brief, therefore the compromise was a 7-day voting period, Friday 1800 to Friday 1800, with publicity everywhere for this entire period, but saving the actual 'press ganging' until the middle of the day on Monday-Thursday and the evening in

buildings containing accommodation, rooms for the activities of clubs and societies, and licensed premises. The last day of voting was more of an all-day affair. Voting could be achieved from any computer, anywhere, as long as it was connected to the internet.

As the voting wore on, lessons were learnt; staff exhorting the virtues of voting were in future to be familiar with KCLSU's achievements and differences made to members' lives. When confronted with the simple question 'Why should I vote?' I found myself busking somewhat on topics ranging from increased library opening times, cheaper transport, reduced costs of equipment for dentists, better, cheaper accommodation and academic advice. New Labour-esque lists and 5-point cards are not exactly the answer, but certainly may usefully inform this approach. Another highly effective approach was the use of 'flash mobs' (a huge, vibrant crowd of people appearing suddenly in a location where a moment or two ago all had been calm) as the voting came to close; by perplexing and persuading in equal measure we increased turnout markedly in the last few hours. The final additional step was to record the candidate 'question time' using a video camera and 'stream' this via the KCLSU elections webpage to anyone who was looking at manifestos and such on the site.

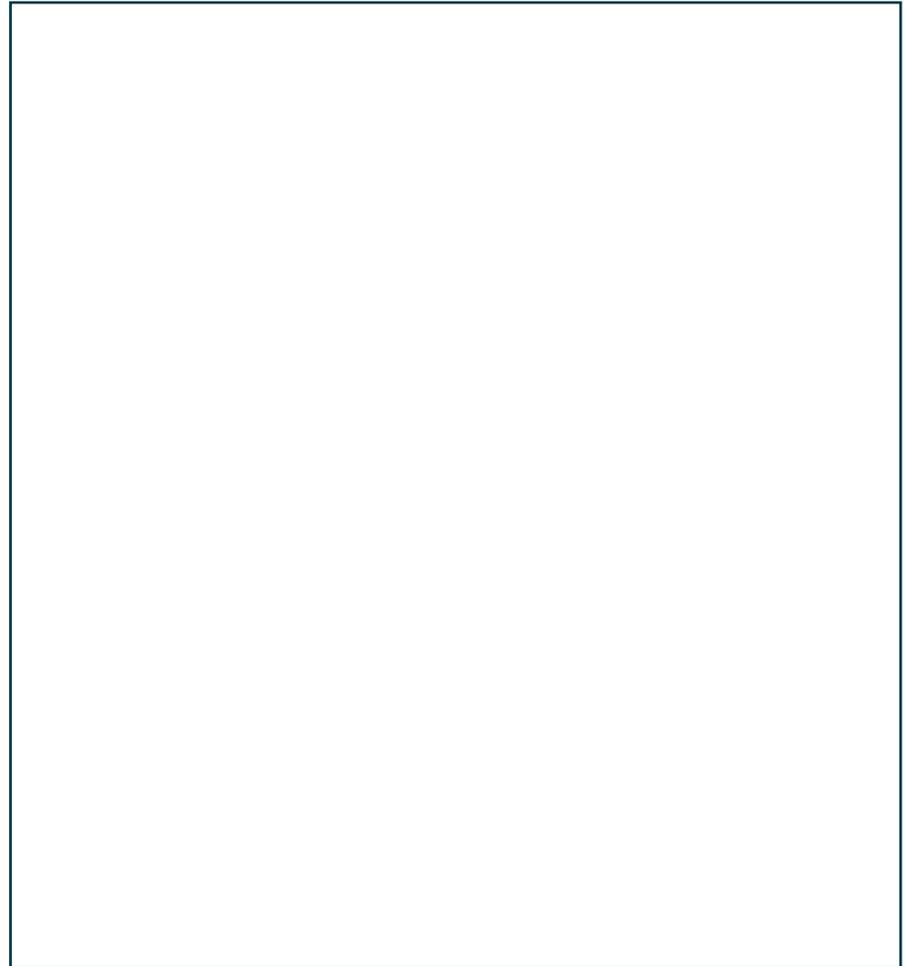In all this, detailed planning was key. Institution staff were consulted for their expertise on busy times in areas of the College, and were closely involved in planning mutually acceptable polling locations and flash mob times. Laptops were set up, wireless and wired networks were identified and connected, links to the system were placed on frequently-used web pages and portals by institution staff.

To ensure members are able to vote once only, and that their identity can be confirmed, security measures must be implemented in the voting system. These usually appear in the form of logging in using a unique user name and password. The other security issue is that ballot information is secure in its transit from the computer used by the voter, and the data itself is unmolested on the system until the returning officer requests the result.

With user names and passwords, liaison with colleagues across the movement seemed to prove that issuing new credentials to members, requiring them to remember, or at least 'copy and paste' a string of letters and numbers, would adversely affect participation. As such much work was done to ensure that the voting system could use members' existing university usernames and passwords, and was as simple to use as possible.

Technically, we faced several challenges. King's is like many universities, consisting of merged institutions, often with computer systems in varying stages of compatibility with each other. Email logins appeared the best way to get people to authenticate with the voting system (every student has an email address). At King's there was no single email system across the entire organisation, so the voting software needed therefore to check user names and passwords against a number of different systems.

The system needed demonstrably to be secure. We elected to cajole the institution's IT department to host the software on their servers, as installing on our own systems left us open to accusations of possible interference by those answerable to incumbent officers, or those with an interest in the election's results.

The connection to the voter's computer had to be secure. If you have ever used electronic banking, or bought something online, you may have noticed some pages which talk of being secure, often with a padlock appearing in your internet browser to convince you that your information is safe. To win the trust of voters, we bought a file called a server certificate to encrypt all the ballot data, which the King's IT department installed in the voting software.

The authentication process involved several steps:

1. Is the voter using a recognized user name and password from any of the merged institutions?

2. Is the voter actually a student?

3. Is this the only time the voter has cast a ballot? (ballot box stuffing is an unappealing prospect)

As luck would have it, the email systems which we checked usernames and passwords against had no way of discerning the difference between
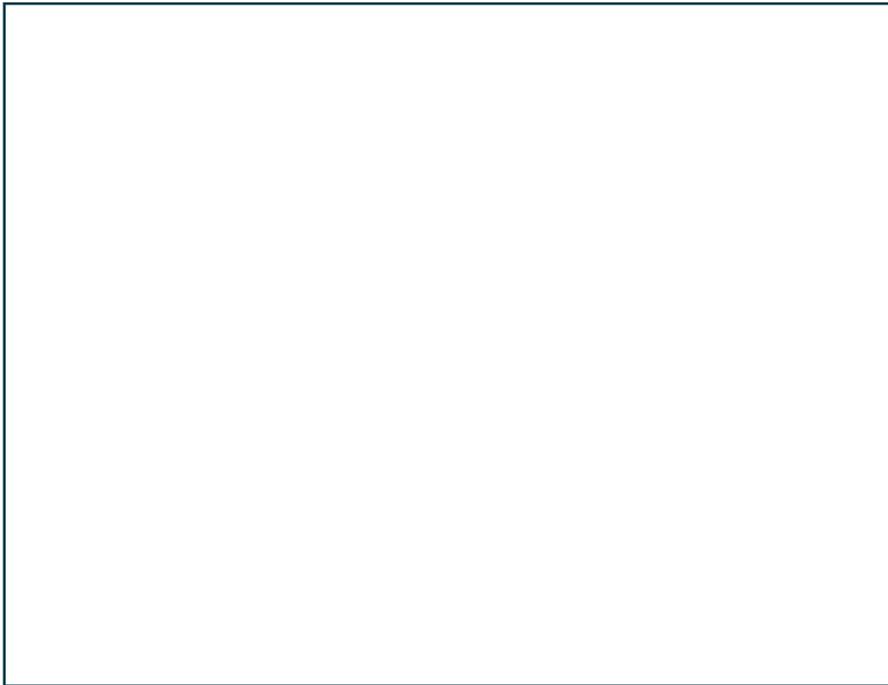
students and staff, and with two separate email systems to authenticate against, our system had to carry out checks against four separate systems before logging in:

1. Something called an LDAP lookup was conducted against first the main King's LDAP server. Pronounced el-dap, LDAP stands for Lightweight Directory Access Protocol; i.e. a big list of everyone's username and password. Submitting these to the server will result in a response of 'yes, that's right, carry on', or 'no, these details are wrong, try again'.

If a 'yes' was received, we moved to step 2. If a 'no' was received, the system tried the recently merged institution server. A 'yes' took us to step 2, 'no' was the signal for the system to reject the login.

2. Because the main LDAP server had no idea whether its usernames and passwords belonged to students or staff, the system then had next to check the email username against a separate Registry system to check the that login belonged to a student. Should your institution have an email system which can tell the difference between a student and a staff member, you may dispense with this step.

The King's IT department obligingly created something called an Oracle View which pulled the required information from the student record system (essentially it asked the system to list all the current students' email user names). The voting system then compared the Oracle view against the login used in step 1. If they matched, we were through to step 3, if not, the login was rejected.

3. The voting system needed now to check that the voter had not already cast a ballot. It kept a list of usernames which had been used to log in and successfully submit a ballot. This information was deliberately kept separate in its own database from the actual ballot information, to ensure complete anonymity of voting preferences.

A 'yes, vote already cast' from the database sent a message back to the voter saying exactly this. A 'no, they haven't voted yet' allowed the system finally to welcome the voter to electronic ballot paper and cast their vote.

Of the products in the marketplace we selected a system called Easyvote, which is a web based software package which was able to record STV votes for multi-member constituencies (e.g. choosing 6 council members for a constituency from a field of 10 candidates), a tricky piece of maths which several systems were at the time still not able to achieve.

The communications between the Easyvote server and the various other systems were encrypted using a piece of software called 'stunnel', to ensure no-one physically connected to the King's network could influence the system.

A feature we requested in the system was an anonymous tally of voting numbers by location. This was achieved by asking the King's IT department for identification information (called IP addresses) of each of the main collections of computers and halls' connections across the campuses, and entering this information into the Easyvote system. As such we were able to monitor, site by site, the ballots at different times throughout the day, allowing us better to deploy our resources.

'Selling' the software to colleagues and institution staff involved extolling the

system's benefits beyond KCLSU elections. Surveying members on an ongoing basis, for our own purposes, institution QAA audits and such, coupled with conducting elections for affiliated clubs, societies and other organisations, persuaded the doubters. Winning the support of the King's Registrar was a useful step toward getting the system completed to schedule, and an agreeable lunch with the head of IT helped smooth over any operational issues.

One remaining factor which ensured the system's success was a publicly viewable 'test election', which built confidence in the system among members and candidates. For this purpose, all the ballot papers from the previous cross-campus by-election were entered manually into the system. The results, when requested, were exactly equal to the result sheets signed by the returning officer at the time of the by-election results announcement, and as such the system's veracity was proven.

When it came to it, turnout did actually drop a little in comparison to the previous trustee election. However we are confident this was due to many fewer posts being in contention, with a commensurate reduction in the number of candidates. KCLSU's recent governance review gave rise to the launch of a new oversight and leadership structure, a review which carried as one of its recommendations a move to electronic voting as soon as possible. We decided to use the first election to elect just the students on the Trustee board, with other roles being filled later. In the last election, with 39 positions elected, 2669 people cast a ballot. In this election, with 8 people returned, there were 1927 voters; clearly the voters this time far exceeded the personal networks of the candidates and were won around by campaigning, publicity et al.

Anyone requiring further information is welcome to contact me. Various links are listed below, as is a handy cut-out-and-keep list of learning points:

- Plan the elections, from nominations to the count, in detail. Involve key Institution staff in this planning, they have much useful knowledge and are more likely to help if they're involved from the outset.

- Mobility is vital. Use laptops, have flyers and posters, concentrate on the busiest parts of the campus – usually this will involve focussing your efforts outside the building in which the Students' Union happens to be located.

- If you can afford it, issue little badges (not stickers, which will vex the Institution) to issue to students who have voted – stops them being hassled by elections staff.

- Keep all the ballot papers from your recent election handy (ideally a small one) as you will need to test the new system with something.

- Multiply by three the time quoted by IT people to get things working reliably.

- Get the support of someone high up in the institution, pulling in existing favours or by extolling the virtues of the evoting system beyond 'mere' students' union elections.

- Ensure all elections staff are briefed on the recent achievements of the union – so they can enter into debate/conversation with students rather than acting as a flyer stand.

- Do a candidates' question time, video and stream it on the internet, with manifestos and pictures from student activity events and club nights festooned with elections publicity. Elections are not a self-regarding plea

" The communications between the Easyvote server and the various other systems were encrypted using a piece of software called 'stunnel', to ensure no-one physically connected to the King's network could influence the system."

for attention by people 'in the club', the outcome matters and will impact upon students as students, not just consumers. Prove it.

- Technically, keep it simple. Use existing login details from some other system. Don't ask people to remember new user names and passwords – they won't.

- Get the Institution to run it. You can manage the project but you can't have access to change any data in any way, as you report to those with an interest in the election's outcome.

KCLSU – **www.kclsu.org**
Easyvote – **www.easyvote.co.uk**
Stunnel – **www.stunnel.org**
Secure server certificates –
www.verisign.com

How we recruited our external trustees at Reading University Students' Union

Author: Ben Elger
RUSU General Manager

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Governance reform has been a major issue of strategic debate in Students' Unions since 2004 and with the imminent implementation in England & Wales of the Charities Act in 2007 this is set to continue. As more and more SUs review their governance the pioneer SUs are starting to introduce new measures that make up the new architecture of reformed SU Governance. One of the central features of many reformed SU governance structures is an explicitly stated and properly supported Trustee Board. Many SUs have introduced external trustees to bring greater experience and expertise to the tasks of management supervision and strategy formulation in support of student trustees. However, this is a change that many are anxious about and concerned to attract suitably qualified external Trustees that will also be able to support rather than undermine the role of student Trustees. Reading University Students' Union have recently appointed their first set of external trustees and in this article Ben Elger (RUSU General Manager) describes the process used, the applications received and the initial meetings.

We started by placing an advert in the Guardian (taking advantage of their special Wednesday rate for 'honorary' positions which we were alerted to by Laura Hyde at KCLSU, but which regrettably has now been withdrawn) and also following KCLSU's lead by placing on NCVO, Common Purpose and other charitable sector web-sites.

Focused on particular need for expertise in scrutiny/overview, financial/strategic planning, education/charity sector as well as ability to operate in our democratic environment. Made clear that these criteria applied to the mix of trustees rather than being essential for every trustee.

The advert suggested interested applicant rang GM for informal discussion, which gave an opportunity to talk people through the changes we were making, the reasons for them and the nature of the organisation. As well as giving more specifics about time commitment required. This allowed for some self selection on grounds of both

suitability, geography (a couple of people decided to wait for unions nearer their homes).

In total we were looking for a maximum of 4 trustees, although we were not necessarily committed to taking them all from the initial trawl

Candidates were invited to interview in 2 steams. This was because one of the assurances given in the process of agreeing our new structure was that we would encourage and give consideration to the applications of former RUSU officers.

For reasons of diversifying the trustee board, however, it was agreed that we would take a maximum of 1 and a minimum of 0 former officers

Candidate 1: Formerly Assistant Director for Housing at Reading Borough Council, then in Charge of finance and community liaison at Daisy' Dream charity providing support for bereaved children in Berks. Has also been a lay panel member for both Wokingham Primary Care trust and the Dental Complaints Service

Candidate 2: Formerly Barrister and lawyer at the department for the Environment. In addition has been Samaritan, Member of the Legal Services group for the Terrence Higgins trust and a trustee of the Chalice Well Garden in Glastonbury and the Somerset Rural Life Museum

Candidate 3: Formerly a senior accountant at companies including Dell, Merisel and EMI. Also a member of the Independent Monitoring Board for Reading Prison, School Governor, involved in Territorial Army and several charities

Candidate 4: Accountant at Assets Accounting-formerly working at a number of the big accounting firms.

Also Non Exec director of Quinoderms Pharmaceuticals and Chair of Conferences relating to film, media and entertainment. Formerly Sabbatical at Swansea and on NUS Wales Exec (late 1970's)

Candidate 5: Head of International Student Services at Brunel University. Formerly at Centre for Academic Programs Abroad and International Students House. Previous involvement in UKCOSA, STADIA and other student organisations.

Candidate 6: Consumer marketing Director for Pocket group- Mobile Value Added Services Company has previously held senior marketing positions at 2 other internet related companies. Also currently a District councillor (Conservative) In Wokingham. Vice president Finance for RUSU 1990-91

Candidate 7: Political Advisor (Labour) for majority group on Tower Hamlets Council. Formerly NUS Vive President Education, SEANUS convenor and a member of the NUS Europe (ESIB) Executive. Also Chair of Governors for a special school in Reading and National Co-ordinator of Labour Friends of Bangladesh. Vice President Finance for RUSU 1999-2001

Candidate 8: Policy Officer, National Council for Voluntary Organisations with responsibility for rural voluntary organisations (including governance/finance issues.) Previously worked at Office of Deputy PM Also, director of a resident association company. Societies Chair on RUSU Exec 1998-2000.

Candidates were invited to an assessment process comprising of 3 parts. Firstly, they were given a tour of the Union building (site!) by a current trustee who was also tasked with some

"One of the central features of many reformed SU governance structures is an explicitly stated and properly supported Trustee Board."

further explanation of roles within the Union and obviously picking up any questions arising from the tour. Next, there was an informal interview of about three quarter of an hour with the General Manager and one of the Sabbatical trustees, covering such areas as motivation for applying, understanding or role of trustee, special issues of being an 'external' trustee, areas of expertise, ability to devote time, with an opportunity for applicants to ask questions at the end of this phase. Finally, 2 or 3 more trustee joined the group for lunch/tea and very informal discussion of issues arising, interests etc

We had very good feedback on this process, which in general seemed to make people feel comfortable and expand their knowledge of the organisation.

If you wish to read past articles from Agenda about Governance reform they have been collected together as a single PDF file available to download at the AMSU website: www.amsu.net/agenda/

Given that Governance reform is such an important and multi-faceted topic further contributions from SU staff and sabbaticals are most welcome.

Arguments against outsourcing Students' Union advice services
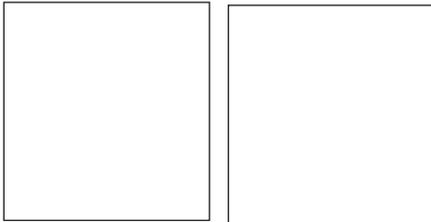
Author: Trish O'Neill
Membership Services Manager at
Liverpool Guild of Students

Paul Norman
Advice Centre Manager at Manchester
Metropolitan Students' Union

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The last few editions of Agenda have featured several articles concerning SUs outsourcing services and activities, looking at general principles of outsourcing, applying it to catering and accounting and in edition 84 (p19-21) advice services. In response to the latter article by Mark Horne (General Manager at Kingston University Students' Union) Trish O'Neill (Membership Services Manager at Liverpool Guild of Students) and Paul Norman (Advice centre manager at Manchester Metropolitan Students' Union) present some discussion points on the benefits of keeping an advice service within the students union. As current or past advice centre managers from a former sabbatical officer and CAB respectively they share a different viewpoint on SU services compared to that of Citizen Advice Bureaus and the merits of outsourcing advice work to local CABs.

They highlight the unique and different benefits that an advice service brings to a Students' Union compared to a catering outlet, they give examples of how the link between advice service and university representation and social policy and campaigning can achieve additional benefits for students. They believe that the realisation of this in practice is an important difference between CABs and SU advice services and can be used as a strong factor in attracting and retaining motivated staff in SU run services. They also explore the benefits of an effective advice service to the overall SU brand and the organisation's values, alternative ways to guarantee service quality. They also believe that the need to build long-term and recurrent relationships with university management requires a subtly different approach and leads to better results for students. They also share their experiences of working with legal firms on cases, and conclude that with the introduction of tuition fees well funded, good quality, SU run advice services are not only more important than ever to all stakeholders (Students, Union, University) but should expect to be better funded than in the past.

The first issue we thought to address was that of cost. It is important to accept an effective progressive advice centre is an expensive resource to provide. From Mark's article it seemed to us the cost of the outsourcing project at KUSU exceeded their initial budget because the CAB were not willing to attach their name to an under resourced service and, we presume additional funds were needed for industry level wages, certain resources, training and admin support. This is also without the outsourced service handling academic matters so the adviser and the sabbatical officer will presumably need to share some cases. Neither of us felt that the acceptance of the cost of quality necessarily depends on an outside organisations contribution.

At the heart of any serious students union advice centre is the belief that the advisers should be professional, trained and experienced. Generally over recent years most student unions have moved away from sabbatical officers undertaking casework and towards employing staff with experience in advice work. Mark's article referred to the recent success gained when KUSU outsourced their catering service to Subway. This however isn't a directly applicable comparison due to complex long term links which SU advice centres have with drop out rates, the general mental health of the membership as well as principles of natural justice and students as consumers. The requirements of providing a dedicated space, a sufficient training budget, costly subscriptions and information systems, relatively high wages for skilled staff and time away from casework for administration and development is expensive in comparison to many other traditional stalwart services. There are however strong arguments for why student unions are the ideal organisations to provide them for the benefit of students and the university who should invest part of their increased revenue from tuition fees in their development.

Sabbatical officers enjoy a unique position within a university community due to their elected status. They have the ability to enact real change in university policy at committees and working groups that can eliminate persistent difficulties students suffer, assuming they are well briefed on the issues, armed with case studies to demonstrate the unfairness and present an

alternative way forward. It is for that reason why experience is necessary for the advisers to link in to the work of sabbs who need to be able to concentrate on their representative role. The benefits of a university being able to see their students union providing this two tier service is more important than ever. Keeping the advice service in house allows for a comprehensive service dealing with all areas of advice work including academic issues and eliminates the need for the involvement of transferring the cases between advisers.

The issue of social policy throws up another aspect in terms of recruitment. We personally feel that this is not referred to enough in union job adverts. Many CAB advisers we have known feel they regrettably have to deprioritise social policy recording due to heavy caseloads and limited time. It can seem a very long way from Fazakerley to Westminster and few advisers can see their casework effecting social change; but working in a university offers many such opportunities. For example MMU have recently agreed to insert a paragraph in all debt letters they send to students informing them of our availability and role. They will also fund the printing of additional copies of our money management booklet and this will be sent with these letters. This occurred following a sabbatical officer meeting senior MMU management as to why our involvement would be beneficial to all involved when the University seeks to recover debts from its students. Other opportunities include improving housing standards, streetsafe initiatives, bursary levels, customer services standards, the work of NUS and countless others. When coupled with comparable wages to the national average, a vibrant workplace, generous leave and the resources to provide a professional service working in a students union should
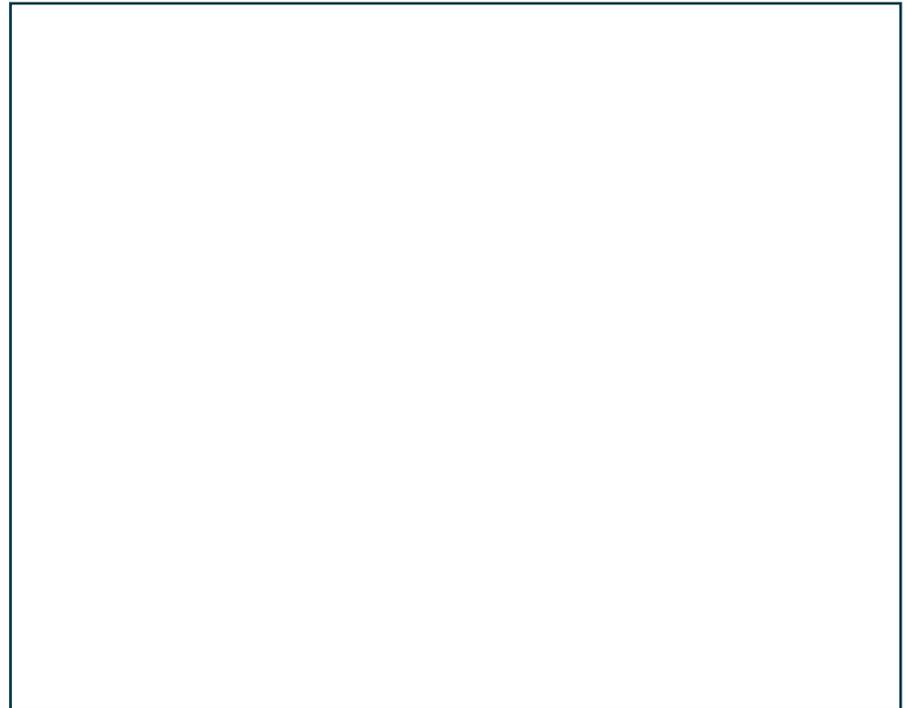
be advertised as a very attractive option to potential candidates.

A well-funded advice centre should have limited need to refer most housing, debt, funding, benefits and academic enquiries. They are all crucial to the student experience and the necessary training and specialist support agencies are available. Mark's article expresses amazement of the CAB adviser's ability to access information in specialist areas. We both felt that an students union advice centre should, as a foundation, have access to the organisations CABs usually use such as SHELTER, CPAG, Advice UK, NACAB, The Disability Alliance, in addition to the student specific organisations such as Skill, NUS, Unipol, NASMA, UKCOSA and RAWS that most CABs are unaware of.

The branding of the CAB would seem considerably advantageous in terms of client confidence, however this may only

" The first issue we thought to address was that of cost. It is important to accept an effective progressive advice centre is an expensive resource to provide."

offset poor membership perceptions of the students union in terms of professionalism, effectiveness and independence, all of which should be addressed anyway. It is true that an effective advice centre needs to be regarded highly in these terms but these are surely principles at the heart of any students union and if they are not
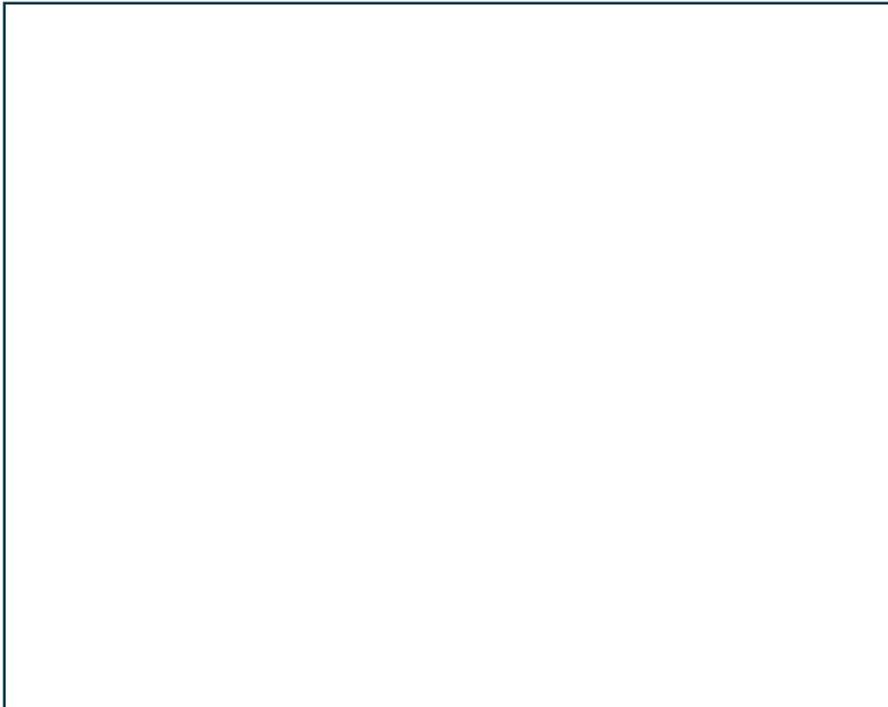
> " If the university is confident in it's' students union advice centre then support departments will refer to the service whoever provides it."

already present then work needs to be undertaken to establish them. An advice centre provides a great opportunity to help do this. If branding is needed then the CLS logo can add the same value and also sends out a strong message to the university that your student union is capable of providing a professional and structured service in line with the national standard. It is not necessary to outsource the service to attain the quality mark or the standards associated with it; you could just employ from CAB or other student unions and adopt the practices the advisers are used to. Publication in the CLS directory also opens you up for referrals from other agencies.

There may also be an important consideration in terms of how students union and CAB advisers approach casework. The CAB tend to deal with faceless individuals from Councils, Benefits Agency, Inland Revenue and debt recovery agents and as a result can be technical, reliant on Advisernet information and less flexible due to constant reference to the CLS transaction criteria. University staff often require a more sensitive and flexible approach as the same people will be dealt with repeatedly. At a senior level

the union can benefit by presenting its arguments as the concerned relative we are, a more robust approach can be counterproductive and worsen working relationships, which can result in a tightening up of unfair practices rather than a review. Although this can be learnt in time it can be quite a culture shock at first. During Paul's early days in student advice work he was surprised that by simply referring to 'students' rather than 'clients' he received a noticeably less defensive response to his letters. Implications can be more effective than what are perceived as threats and allow the university to believe they have acted voluntarily rather than being forced to do something they think is not in their interest.

Our experience of CAB solicitor services is that they are generally run to the advantage of the solicitors' office. Unless the enquiry can be brought back to the office and generate income then the client receives only very basic advice or a referral to another agency. They are often unreliable due to the demands of their own service and the rota solicitor often struggles to attend which results in client frustration and dissatisfaction with the scheme. We have also found the relationships between solicitors and local CABs can be strained with solicitors suspicious of donating advice they could receive payment for and CABs disapproving of solicitors who only advise up to the point they can bill the CLS and then refer on to CABs to fill in the gaps, such as form filling. The availability of solicitors will depend on the particular solicitor and advice centre.

CAB are also funded in a very complicated manner, usually through local authorities and the CLS. Jobs can often depend on quantative performance indicators to

demonstrate how output hours in advice areas have been achieved. The internal administration and practices can, as Mark's article stated, result in the organisation being very rigid, slow to move and unwieldy. MMUnion have encountered recruitment problems for an advice post at one of the Universities sites and we were approached by a CAB who suggested we outsource the service to them. At the resulting meeting we explained why it is important for the University to see the union providing this service though we did suggest a joint post with half the time spent on the university site. The CAB informed us they would contact the CLS about this and get back to us. At the time of writing no response has ever been received.

If the university is confident in it's' students union advice centre then support departments will refer to the service whoever provides it. Our services are mentioned on the university's website and this will inevitably lead to enquiries from the non traditional student makeup, as they will usually be those who are eligible to claim benefits, require debt counselling and be unfamiliar with current academic conventions.

Overall we believed Mark's article praised the benefits of a well-run advice centre and that the advantages could be gained within the SU auspices. Despite being expensive to run there is money available from the universities due to the increased tuition fee revenue and the fact that the service has a strong positive influence on the student experience, recruitment and retention, which is very valuable to the institution. It is more important than ever that student unions receive their proportion of this income and re-invests it by demonstrating to universities that the prevailing belief that we are amateurish,
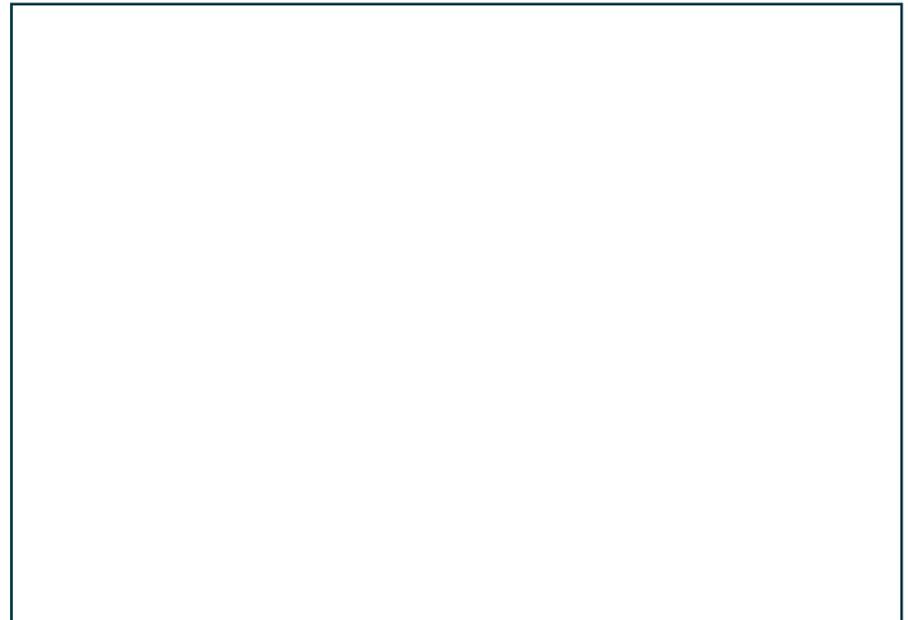
wasteful organisations who cannot run a professional service is incorrect. With this in mind there are few services that lend themselves better to student unions than an advice centre effective on the front line that also offers intelligence for strategic influence at a senior level. This helps students feel a sense of belonging and loyalty to the union positively affecting membership involvement.

Mark's article left us thinking they had commenced the project looking for a 'cheap option' but were instead persuaded by the CAB that this cannot be done and that despite the relatively high running costs it is a project well worth investing in for all stakeholders. This struck us as being a little sad and if too many SU services are outsourced then surely it is only going to encourage HEI's to question the role of the SU and consider 'cutting out the middleman'.

This subject is due to discussed further at AMSU RAWS (Research And Welfare Staff) conference in April 2007.

As Students' Unions continue to struggle financially and face the new demands that the Charities Act will bring to demonstrate that they are achieving best value in how services are operated, outsourcing of services and activities may become more extensive. Agenda magazine welcomes articles for future publication from Students' Union staff expressing views and experiences relating to outsourcing. You can read the previous articles via the AMSU website as follows:

- Ben Elger on outsourcing the accounting function Agenda 83 P10-13 www.amsu.net/agenda

- Mark Horne on outsourcing advice service at Kingston SU, Agenda 84 p19-21www.amsu.net/agenda

- Jim Gardner on principles of outsourcing and its application to catering services: Agenda 85 p24-29 www.amsu.net/agenda

It's time for a ChangeUp

Author: Dan Sumners

Dan Sumners, who was Policy Advisor at King's College London Students' Union, describes how innovative networks, set up by the Government to accelerate learning and best practice across the voluntary sector, could lead to significant improvements in quality across students' unions.

The National Council for Voluntary Organisations (NCVO) has implemented a key element of government policy in the ChangeUp hubs - a network designed to help and support voluntary and community sector organisations. For students' unions, this is a perfect time to extend their activity and impact by further engaging with organisations with whom we share so much.

In 2004, the Home Office produced a report, 'ChangeUp: Capacity Building and Infrastructure Framework for the Voluntary and Community Sector', that recognised the "crucial role in delivering public services and building strong, cohesive and self-determining communities"1 that the voluntary and community sector (VCS) plays.

Around this time the Chancellor, Gordon Brown, in conjunction with the Home Office, established the Russell Commission "to develop a new national framework for youth action and engagement"2. Its subsequent report has been a springboard for the VCS to reinvigorate enthusiasm amongst young people for the work that it does, and begin to establish itself as integral to the positive development of our community.

Two years later, an event was held in Birmingham in March 2006 to introduce six national 'hubs of expertise' to VCS trustees and staff. Those present represented a huge diversity of organisations, from local voluntary service councils to the Citizens' Advice Bureau, the Immigration Advisory Service to the

Parent and Carer Council. And a students' union.

The national hubs are the most tangible outcome of the Home Office report to date, and another lengthy document published by the Treasury explains their role. 'The Role of the Voluntary and Community Sector in Service Delivery 2002 - A Cross Cutting Review', also, found that although the VCS had experienced something of a revolution in its contribution to public service delivery, nothing like such a change had come about in the support they were able to access. That is, many services that the government is expected to provide were - and still are - being underpinned by voluntary and community sector organisations, with nothing official in place to help them.

This is the experience of most individuals involved with the VCS, of doing as much as possible with as little as possible, often without thanks. At some point in the last few years it occurred to the Chancellor that perhaps they deserve some help.

The hubs

The ChangeUp report argued that "Hubs of expertise will act as beacons of best practice and provide strategic leadership on their designated topic. They should be responsible for taking a sector-wide overview and for advancing thinking and practice in their particular area"3. That is, if a VCS organisation has a question, or doesn't know how to progress, their first port of call should be one of the six hubs, "responsible for gathering and promoting best practice to frontline organisations"4.

The 'designated topics' are

- finance (http://www.financehub.org.uk/);
- governance (http://www.governancehub.org.uk/);
- ICT (http://www.ictconsortium.org.uk/);
- performance (http://www.performancehub.org.uk/);
- volunteering (http://www.volunteering.org.uk/aboutus/volunteeringhub/); and
- workforce (http://www.ukworkforcehub.org.uk/).

A quick glance at their respective websites hints at the nature of the national hubs - a coming together of people and their ideas within a sector that more than any other is in need of the free exchange of ideas and resources.

Collectivism

The most important element of the hubs is the ethos upon which they are founded. Not only has it been recognised that the VCS is important to the successful administration of UK society, but that working in concert is of great value. The spectre of this particular Labour government extolling the virtues of collectivism is disturbingly surprising, and one not to be shrugged off lightly.

Students' unions and the hubs

This is a government initiative that, like the Russell Commission, actively promotes the spirit of our organisations, and represents an opportunity for us to make new, and build on existing, relationships within the VCS.

At the Birmingham event, the Chief Executive of NCVO, Stuart Etherington, in his closing speech reminded delegates that this initiative will only succeed if those for whom it has been designed engage with it. As students' unions we deliver a plethora of services, as opposed to many small frontline organisations that have a singular purpose; we are therefore well placed to offer the benefit of our experiences, but at the same time could make great use of the hubs.

Here at KCLSU we will be setting up a working group to consider the next step, in the belief that we will be able to both benefit from the hubs and add to them in various ways, such as

- attracting funds for projects such as volunteering and the administration of funds from diverse sources;
- promotion of good governance and the sharing of experiences;

- expanding ICT infrastructure and ensuring it is fit for purpose;
- improving performance to ensure we have a positive impact on the lives of students;
- effectively marketing volunteer opportunities and supporting volunteers;
- retaining and recruiting the best staff and volunteers.

Why should students' unions be exhorted to involve themselves in a sector of which they are not a part? Indeed, we are an independent network of organisations unlike any others, involved in supporting volunteering, protecting the welfare of students, operating commercial concerns, and so on.

Firstly, students' unions are indeed a part of the voluntary and community sector. Every day hundreds or thousands of students are supporting their local communities by volunteering; we support campaigning that aims to change the world for students, and thereby society as a whole; we have changed laws; we equip young people with the skills required for them to become effective and valued citizens; and we promote education - the cornerstone of any successful society.

Secondly, the fact that our organisations are unlike any other, and our services so diverse, means that we have a wealth of knowledge to share.

But we have much to learn. For example, the experience of reviewing the governance of KCLSU has demonstrated exactly how much support may be required when embarking on an unfamiliar venture, and the quality of the support that is available. Without the NCVO, the

example of local authorities and the experience of solicitors in dealing with other charitable organisations, we would never have ended up in the favourable position we feel we occupy today.

The future

For a long time students' unions have had to focus on their commercial activity, and for good reason. However, this has meant that our core reason for existing has been allowed to fall by the wayside somewhat - supporting the development of students, representing their interests and encouraging them to participate in the communities of which they are a part.

When I joined KCLSU two years ago it had already begun to move away from a focus on commercial concerns to membership services, and this is a trend I believe we will see take hold over coming years. Students paying higher fees will be looking for a more rounded experience, for value for money, and unfortunately we're just not going to deliver that through a bar.

It is clear that in London, however much we try and compete, we just cannot. Even students' unions of campus universities are not going to satisfy an increasingly diverse student population with cheaper booze and beach parties any longer. We need to provide what nobody else can for students on campus: more and better volunteering opportunities, support for activism, and, above all, informed, mature and effective representation.

To truly deliver we cannot assume that we already have the skills and experience, or that because we're 'different' that we can't learn from anyone else. As I have said, we have

lots to share, but there are organisations and individuals that have had a much harder time securing funding, that are successful campaigners, that support those people that fall through the cracks in society.

The hubs could be the beginning of something much greater, but, as Stuart Etherington said, its up to us to make it happen. So don't look for reasons not to be involved, or argue that it's not for us - go to one of the websites, find out some more, and sign up to a mailing list or two. We will all benefit from a national network of like minded people and organisations that together can only be stronger and more effective.

" However, this has meant that our core reason for existing has been allowed to fall by the wayside somewhat - supporting the development of students, representing their interests and encouraging them to participate in the communities of which they are a part."

Recruiting a new General Manager: Reflections of an external adviser

Author: Vic Langer

In November 2005 AMSU launched its Guide to the Recruitment & Selection of Senior Managers. This is available from the AMSU website and has also been mailed in booklet form to all AMSU member Unions. The guide does include a chapter on the role of an external adviser in these processes and here Vic Langer, NUS London Regional Manager, narrates and reflects upon her recent experiences acting as an adviser to a Students Union.

Back in the summer I took a call from a London HE Union about assisting them to recruit a General Manager. Not having completed a senior manger recruitment process at that point, I was a little bit apprehensive. However an advanced copy of many chapters of the recent AMSU publication on Recruitment and Selection in hand, the attitude of there is a first time for everything, coupled with it being important for me to make contact with this union following the restructure of the NUS Regions, this union being a recent addition to the London region, I agreed to take on the task and set about planning.

Having been at NUS for 4 years, carrying out and being involved in many recruitment processes, very recently in NUS, in my previous job, and through supporting students' unions I (perhaps in hindsight rather foolishly) thought that advising a sabbatical team on a General Manager recruitment would be relatively straight forward. I perceived I had a full grasp of the tasks ahead, however in reality the situation turned out to be very different. I quickly realised that there are so many things that you cannot plan for and lots of things that can be easily underestimated. As part of 'learning from doing' I put together a collection of thoughts below based on my recent experience, in no way is it prescriptive, but a collection of thoughts based on experience.

The information below is advice I would have given to myself had I had a crystal ball, and generally some tips I would want to pass on to anyone who finds themselves in that position.

It is worth noting that despite some of my personal learning, the challenges that I and the officer team faced individually and together, and some difficulties with the process we achieved a successful outcome, an outstanding candidate appointed, as I am confident time will prove. Should I get a phone call like this in the future I will be certain to check I have the time to get this right, and share the workload more effectively.

Time needed

The first thing that I would say about taking on an advisor role for a senior management recruitment is to consider the time it takes to carry out the role, depending on the 'state' of the union this can be a very time consuming task and needs to be carefully planned.

Before - how much work needs to be done inside the union to prepare for the recruitment was there an exit-interview from the last GM and what does this tell us about the post and the person that the union is looking for? Ensure time is put aside to prepare advert, JD, and gather as much information about the union and the institution as possible. Ensure that time and space is available to talk to all perspective candidates and that you have as much information as possible to be able to answer all questions.

During- Whilst the interview process last a certain amount of time, time needs to be put aside to ensure that all paperwork is properly completed and that the panel can consider the candidates etc.

After - ensure that you factor in all the post-recruitment process can be done such as providing adequate feedback to all unsuccessful candidates.

Local support

Identify what local support is available. If the union has no capacity or it is unwise to rely on local union staff, then is there any support that can be identified through the institution personnel office? Experience identified that it is not useful to have to rely on the sabbatical officers because they are often busy and distracted by their own tasks and often tasks related to this process fall to the bottom of the priority pile.

Ensure that there is someone available on the day to manage all situations and ensure that candidates are as comfortable as possible. Ensure that someone locally can sort out all paperwork, room bookings etc.

Agreeing the process

Once the process is agreed ensure that is written down and communicated to all panel members and ensure that they are fully aware of what responsibilities that they are undertaking. Build in some time to check on this and don't assume that this has automatically happened.

Supporting the elected officers

If the officers have been on recruitment and selection training get a copy of the training handouts or notes to ensure that you are clear about what they have or have not been told during the training. Check to see what was covered on the course. Where they have not attended ensure this happens prior to commencing the process.

Support the officers before the process starts to identify individually and collectively what exactly they are looking for in a candidate - this can head off later disagreements amongst the officers at the decision stage.

Recognise and identify the other pressures that are put on the officers at the local union - especially where it is difficult for you to be there often. Is there local staff resistance to the process? What pressure is the institution putting on the sabbaticals? What is currently going on it the union - how will that compete with the officers attention, time and focus with the recruitment process.

Resources

Identify the resources needed for every stage of the process and where you are not confident that these will not be able to be provided by a locally designated person (in terms of score grid, paper work, refreshments, task print outs, laptop and projector, etc) find ways to ensure that all the resources are ready

and available in advance of the interview days to reduce time wasted and additional pressure on a busy day. If the local union cannot provide a person to support can you take someone in with you to support with the process?

Communicating to the successful candidate

Once the successful candidate has been informed ensure that the union identifies its responsibility in sending out an offer letter, providing a contract and ensuring that all questions that the candidate may have are considered. Ensure that the union is aware that this is not simply a case of "offering the job".

Setting objectives and targets for initial 6 months

Work with the officers to set some clear and realistic targets about what they expect from the successful candidate in the first 6 months. Ensure that the appointee is aware of these as soon as possible and ensure that they are in line with what they identified that they would be able to achieve at interview.

Induction process

Work with the officers to ensure that an induction process is put together and identifying some key support points inside the institution to assist with the initial integration process. Where there is local support this may be easier, but where the union is under resourced or there is little or no support for the officers this will be essential. It is also important to identify and agree any role in the staff member's probationary review.

Other considerations

Knowing/Knowing of the other candidates - this can place a certain amount of pressure on the advisor -

especially where you are in a position where you can identify potential problems with a persons application form. It is important to ensure that you have access to strong HR advice outside of the organisation to be able to check and get support from over some of the stickier issues that may arise.

Authority throughout the process - even though being appointed as the advisor would appear that you are able to shape the process, think about how this can be agreed and worked out at the start of the process and that those involved recognise that when information is requested or advice on the process is given that this is because of experience and awareness and that this is more or less understood and accepted.

Agreeing what is and isn't your role - ensure that the union is clear about what you can and cannot provide. Where some of the support above is not realistic then lay out at the start what is and what they can expect.

There is nothing like the experience of trying to guide elected officials through the recruitment & Selection process of a Senior Manger to highlight just how complex and how complicated the process actually is in practice and the high level of skill required of whoever supports and advises the officer team. A guide to this process is long overdue and congratulations to AMSU and Graham Gaskell in particular, for finally grasping the nettle and getting it produced. I hope that my experiences and those of other NUS staff will be used to ensure that NUS is better prepared to meet the needs of Unions facing this challenge in the future.

The AMSU guide to Recruiting & Selecting SU Senior Managers can be found at www.amsu.net/.

Managing change at the BBC
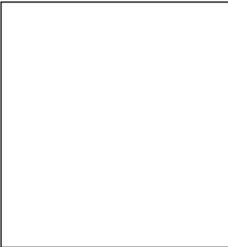
Author: Katharine Everett
Director of Change at the BBC

The last few years have seen Students Unions undergoing massive and significant change. Whilst support for the work that Students' Unions do is generally strong amongst key stakeholders, there is also a sense of a need for renewal in order to take account of the changing world in which we operate, to develop a fresh approach to governance and engagement with stakeholders and to provide new methods of funding. At a seminar for senior managers and officers in 2006 the whole issue of change management was considered and a number of speakers from outside organisations gave presentations. Katharine Everett is Director of Change at the BBC and is responsible for co-ordinating a programme of change in processes, systems and culture to make the BBC fit for the digital, on-demand world. She has a long and well-established career in TV production.

Since I've been involved in managing change in the BBC I've spoken to many colleagues doing similar jobs in other public sector organisations. Whether it's local government, the NHS, the Police, the BBC or education, the challenges are the same. And they are similarly daunting. I believe passionately that the only way we can rise to those challenges is by sharing our experience with one another. So in this article I'm going to share the BBC's experience of change over the past 12 years.

When the BBC was founded in 1922 it was one radio station, broadcasting from a small studio near the Savoy hotel in London. Today we employ 27,000 people supporting

8 television channels, 10 national radio networks, 50 local radio stations and a million pages of web content. We work from over 400 locations in the UK alone, and we also run public service and commercial activities around the world. Two thousand of our employees are located outside the UK.

So, given the difference between what it was then and what it is now, the BBC ought to know a bit about change. It's been doing it for 80 years. But here's the weird thing. If you're say a producer – as I used to be – it doesn't feel like that at all. It feels, in fact, that half your energy has to be put into preserving things as they are so that you can continue to make great programmes. There's a sense amongst the creatives at the BBC that the organisation needs to be protected from the ravages of the management – I wonder if that strikes any chords with readers? What I'm saying is

that it's hard for individuals within an organisation to recognise the need for change and in a strange way it becomes harder the more you impose change on people.

Over the past 80 years the BBC has had 14 different Director Generals but one core purpose: to enrich people's lives with output that informs, educates and entertains. It's that clarity and consistency of purpose which, despite the differing styles of different DG's, has kept the BBC focused, strong and relevant to our audiences. And there's been something else too: our willingness to learn from our experience of change. I first got involved in change when John Birt was Director General. Birt was driven by a sense of urgency borne of the BBC's failure to keep pace with expectations of how public services should be run. As well as leaving us a dynamic – and probably life-saving - digital legacy, he also tried to tackle the bureaucracy, the fiefdoms, the insularity of the organisation. But his radical style was seen by some as too quick, too autocratic. As he himself admitted in his autobiography "I was certainly driven, better sometimes at identifying problems than applauding success, and at least for some of my colleagues I was overzealous."

Change under Birt was much about process. If there was one mistake, it was that the internal process changes were not clearly linked to the externally facing launches of new services like the BBC web-site. So people couldn't understand the value of Birt's goal of making the BBC "the best-managed public sector organisation" – in fact very few people in the BBC of that time understood the value of good management per se. And in the creative heart of the organisation people loathed the fact that change was being done to us, by consultants. One of the reasons why I got out of programme making and into

management was because I thought I could do the new management jobs being created in the wake of Birt's changes better than someone brought in from the outside.

Now Birt's changes did achieve some success and the outside world certainly believed real progress had been made. But internally there were still issues around the culture, and a sense that new weaknesses had emerged. We'd slimmed down, controlled budgets, become more efficient – but the organisation still felt hierarchical and slow and although we had a powerful digital strategy there was a lot of resistance to it in the creative heart of the BBC, where the linear analogue TV mindset dominated. That wasn't surprising: it was through linear TV and radio that we served the overwhelming majority of our licence-payers. Most damagingly of all, John Birt had appeared to value process over creativity, and morale in programme-making areas was very low when he left in 1999.

So when Greg Dyke arrived in 2000 his aim was to motivate 27,000 people. Without the people all you have at the BBC is a library of old programmes – the people are everything. Greg wanted to change how the BBC "felt" inside – he wanted to make it feel smaller, One BBC. And in 2002 he launched a major programme of culture change, called Making it Happen. This programme had five major goals: to re-energise our creativity, to get people focusing more on audiences, to improve collaboration, to raise standards of leadership and to make people feel more highly valued. One of the things we'd learned from the Birt era of change was if you don't involve your people in designing change, they don't own it. Greg was determined that while the inspiration for culture change came from the top, it was people at every level of the BBC who should work out how we did the change.

We involved 10,000 people - nearly half our employees – in a series of consultations we called Just Imagine, based on a process known as appreciative enquiry (AE). AE concentrates not on what is wrong, but on what works. In the BBC we are very good at analysing what is wrong but that has tended to create a downward spiral into whinging, blame and a sense of helplessness. AE by contrast encourages people to talk about times when they have been energised and successful, and to consider how to do draw on those strengths. I mentioned earlier how hard it is to get people to recognise the need for change; appreciative enquiry was brilliant at helping people understand what could change and how they could help bring about that change themselves.

We ran an appreciative enquiry session at a senior leader forum we created to help drive change. People who'd joined the BBC on the same day 20 years ago but who'd never met, shared their experiences of a lifetime in the corporation. Some were in tears. I sat next to a manager in the World Service who'd been in the BBC for over 25 years and had never had a conversation with anyone in television before!

One of the most important outputs of the Just Imagine process was the development of a set of values, which codified the attitudes we expected of each other and that the audience could expect of us. These were very warmly received but we probably underestimated the work we needed to do bed them into the organisation and to ensure the behaviours that underpinned each value were being modelled by leaders across the organisation. The most important output from the employee consultation was a forty point action plan which included establishing a leadership programme, a new approach to giving feedback, improved workspaces, online access to audience information, a network of creative

facilitators and an induction programme for all new joiners.

Two years on the place felt tangibly different and our annual staff survey showed pleasing progress. We'd moved from the autocracy of the Birt era to the empowerment of the Dyke era – we'd put people at the very heart of change - but once again we hadn't tackled everything. We still weren't managing performance well enough, and we'd taken our eye off efficiency. We also dodged some of the process changes necessary to simplify the culture. And ironically, by creating a sense of "One BBC" the outside world began to wonder if we were too big. Everything changed overnight when Greg Dyke left the BBC in the wake of the Hutton report. When that happened, where were we after 12 years of continual change?

We were still a formidable bureaucracy. As Greg's successor Mark Thompson observed when he returned to the BBC after two years at Channel 4, we remained "adept at capturing, colonizing and neutralising reform". Complexity seemed to reside in our DNA and we struggled with conflicting priorities, lacking the clarity of a bottom line to aim for. But many things had changed for the better with Dyke at the helm. We'd learned the value of consultation and the ownership that comes from involving staff honestly and acting on their input lessens resistance. We'd understood the importance of leaders in buying into change and role modelling it. we'd helped this by introducing coaching which meets in our leaders a powerful need to be listened to. We'd begun to use our skills as communicators to address our internal audiences. And our values provide a firm foundation as we tackle perhaps the most demanding period of change we have ever faced.

Following Dyke's departure the organisation went into a state of shock akin to

bereavement – that same mix of guilt, disbelief, anger, sadness. And unsurprisingly for the six months following we became very focused on ourselves. When our current Director General Mark Thompson arrived at the BBC in June 2004 we faced an uncertain future. While we had been licking our post Hutton wounds the world had been changing very fast around us. Digital media was – and still is –altering every aspect of our business: how people consume our programmes and content, how we make and distribute that content, how we run the back office and how competitors see us.

7 days before Thompson had arrived, the BBC had published its manifesto for the next 10 years – Building Public Value. It's unusual, to say the least, for the long term future of an organisation to be laid out a week before the arrival of a new CEO. But we were on a timetable set by the Government leading up to the renewal of our charter in 2007. What's interesting now is that while the broad thrust of the vision still holds, and has been endorsed by the Government in its White Paper on the future of the BBC published in the middle of March 2006, things are moving so fast that what felt visionary in 2005, is how happening for real. And nothing is moving faster than the demands of those who pay for us with their licence fees. For possibly the first time in our history our audience is accelerating beyond us. Their needs have become more diverse, their quality bar higher, and they want much more flexibility in when and how they consume our product. Most importantly of all they want content that's relevant to them – and right now one of our major challenges is to attract younger audiences. But it's not just the young. Even our most conventional viewers and listeners want something new. Last year the Queen was given an ipod – and when this fact was revealed at a

leadership forum, people really began to sit up and take notice

What's become crystal clear to the top of the organisation is that the BBC must meet or exceed the accelerating rate of external change or risk obsolescence. Now conventional theory is that you can't embark on a major programme of change until you've worked out your long-term strategy – yet I hear of more and more companies who are challenging that view. The pressure to change is so intense that the change must be started before the long-term is clear – indeed BT boss Ben Verwayen said recently that in the communications business there's no point thinking beyond 18 months, the technology is changing so fast. So rather than having a detailed picture of exactly where we are heading, what we have done is work out broadly what kind of BBC we need to take us through a period of extreme uncertainty and turbulence.

We know we need to be in strong shape to take a creative and strategic lead in the digital future. We need to be a BBC that is truly focused on putting more money into the content and activities that audiences value. We need to be more open to our audiences and our partners, and we need to use technology much more smartly. We've summed this up in four words: creative, digital, open and simple. And the hardest part is becoming simpler – less bureaucratic, more agile. It's hard partly because it means fewer staff – in some of our support divisions, we've had to announce job losses of nearly 50%. And across the organisation, to save £355m to put into programmes and services, we will be outsourcing or making redundant 4000 people. Job losses of this scale have never happened before in the BBC.

So now, after Birt and Dyke, we are in the Thompson era of change. And we've learned some lessons from the past. For a

start we are not using consultants to design and drive our change; we are doing it ourselves. The detail of change is not being imposed from the top. Every one of our 16 divisions has been asked to come up with their own plan for transformation – and those who are making the best progress include those who have involved their staff most widely. Each plan will not only yield savings and reductions in headcount but will also involve new ways of working, new technology, new systems, structures and processes. We know too that while we're good at starting change we're not great at finishing it – so we've pulled all the divisional plans into a single roadmap complete with milestones and success measures and twice a year directors are asked to account for their progress to the director general. We've also mapped out who across the BBC is dependent on whom – so every director understands their part in the overall plan. We've made sure that we can adapt to whatever new creative strategy is developed. And to ensure coherence of messages we've put programme management, organisation development and internal communications into one single team. Running that team is half my job. The other half of my job is to identify and recommend how we meet the challenges that our massive programme of change throws up.

Perhaps the biggest of these is driving ownership of change. I've already mentioned the role of consultation and how that can help individuals engage with change – but there's something else that should come before consultation. It's about ensuring that everyone understands why we need to change. We can't assume when one group hears that the queen's got an iPOD everyone will come into work the next morning asking when their programme is going to be downloadable. People will understand that things are

changing outside but not necessarily make the connection to their day job. We've learned that we need to be much smarter at communicating to get the messages across – and we've learned that it's not a question of telling people once – it's about telling them repeatedly, in as many different ways as possible – what's going on, using different media, viral stories, all kinds of interactive activities. You cannot invest enough time in this. Nor can you invest enough time in getting your leadership aligned – but when it happens the power is extraordinary. Our Director of New Media has made himself hoarse talking about the future - but it's when the head of drama does it that people begin to think differently.

We are only just beginning the current

change journey, and it is one that will not end. Like everyone else we recognise that what lies ahead is constant and rapid evolution, and through the inevitable turbulence we will steer by the loadstar of our purpose: to enrich people's lives with output that informs, educates and entertains. We are delivering that purpose now – and will do so in the future – in ways that Lord Reith could never have imagined. And in the 21st century we have expanded that purpose to include connectivity across the nation and across the globe, and to help build digital Britain. But the central purpose remains the same.

Your purpose will be different, but the principle still holds: know what you're here for.

Raising our profile

Author:

Carolyn Lewis
General Manager,
University of Brighton Students' Union

Carolyn Lewis continues to share her research into how students unions may choose to utilise IiP's new tools for the job of measuring continuous improvement.

Readers of my previous article "Is your Union up to Standard?" (Agenda 85, August 2006) may recall that in pursuing its annual IiP Profile Review in 2005, UBSU had stumbled against two of the indicators, namely 4 (The capabilities managers need to lead, manage and develop people effectively, are clearly defined and understood) and 9 (Investment in people improves the performance of the organisation), thereby rendering indicators 5 (Managers are effective in leading, managing and developing people) and 10 (Improvements are continually made to the way people are managed and developed) unattainable. Indicator 4 requires "the capabilities managers need to lead, manage and develop people effectively (be) clearly defined and understood" throughout the organisation. Consequently, UBSU designed a questionnaire for circulation amongst UBSU staff and officers about their expectation of management capabilities by linking the questions to the AMSU Code of Conduct and IiP Profile indicators 4 and 5.
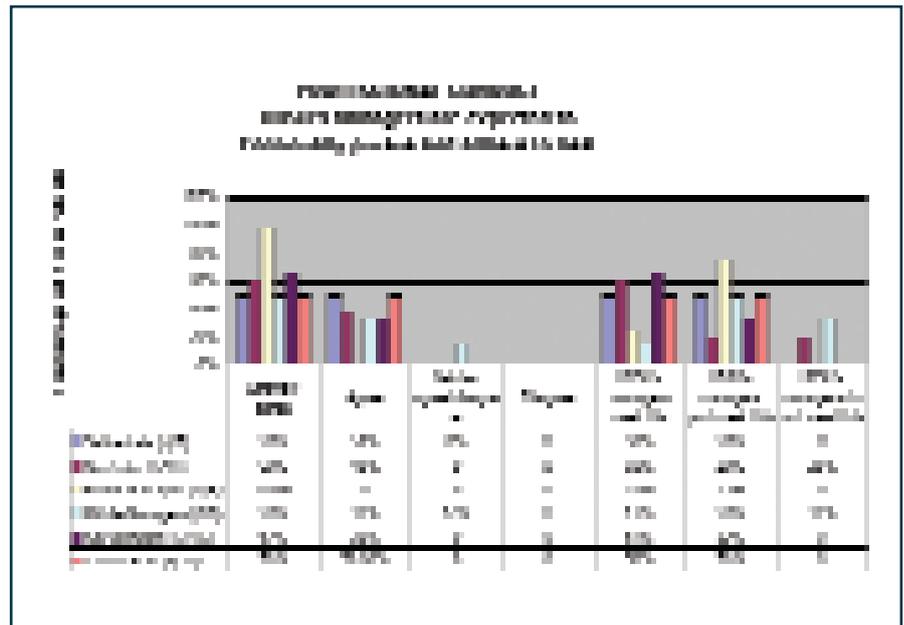
Table 1: Example response to UBSU questionnaire relating to AMSU Code of Conduct (Professional Conduct)
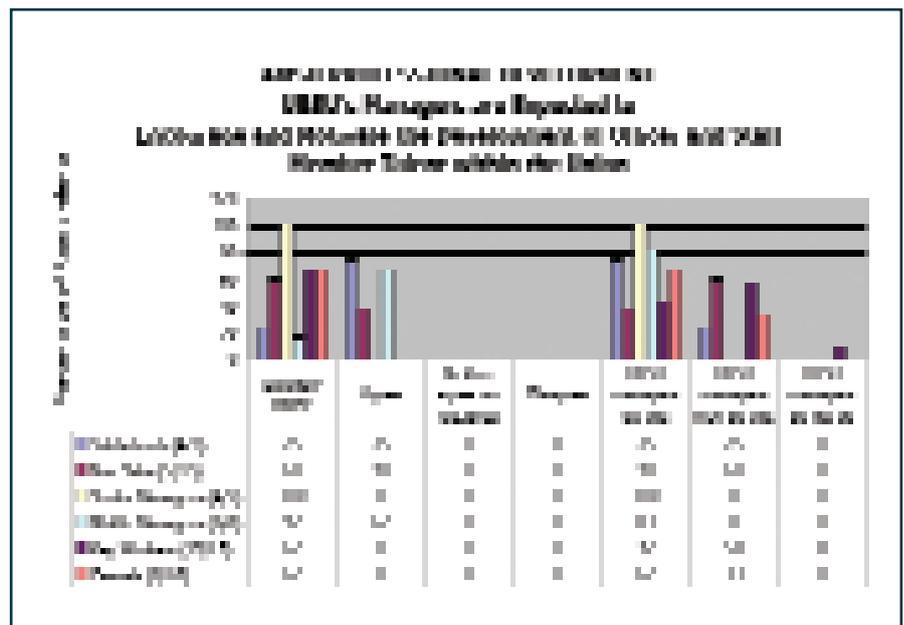

Table 2: Example response to UBSU questionnaire relating to AMSU Code of Conduct (Professional Development)

What was the outcome?

The survey was of course intended to raise awareness amongst staff and officers of the organisational need to define "the capabilities managers need to lead, manage and develop people effectively" and also to introduce the AMSU Code of Conduct prior to implementation. The IiP Assessor was certainly convinced and found the visual presentation of the questionnaire's findings most helpful when writing up his report …

"A plan is in place to provide sabbatical officers with leadership and management development. This plan will be built on following a survey UBSU has carried out, asking staff for feedback on management using the AMSU framework and elements of the Investors in People Profile Tool. Managers were able to describe how they were effective in line with the AMSU code of conduct. The 360º feedback was generally an endorsement of this. Sabbatical officers and managers described the 360º feedback as valuable both to endorse good practice (and boost self esteem) and highlight development areas.

"Managers and sabbatical officers are encouraged now to keep these capabilities alive by continuing with the planned 360º reviews and leadership development programme as well as by discussing the outcomes of the survey. It would also help to continue to involve staff perhaps by communicating the results and lessons learnt from the survey and what action will take place".

Our Profile Review 2006 was successful and we have now returned to the Standard. The Assessor has retained a copy of the AMSU Code of Conduct and was impressed with UBSU's commitment to rolling this out to all staff and officers through

- New staff and officer induction
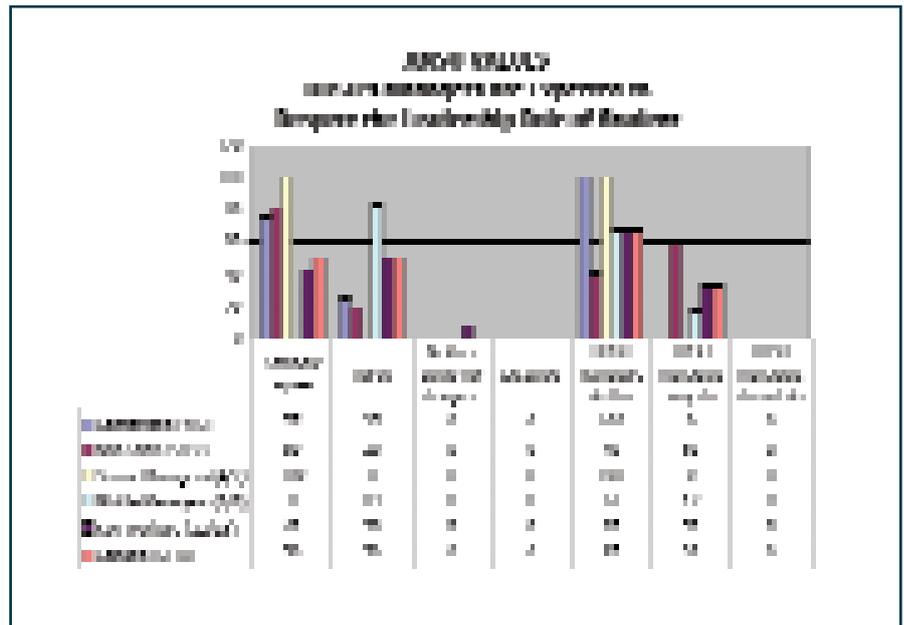- Best Practice Group

Table 3: Example response to UBSU questionnaire relating to AMSU Code of Conduct (Values)

- Service area meetings
- The respective end of term staff meeting
- Individual workshops

There is also a side effect to the questionnaire in that last year's sabbaticals, one of whom is now in their second term, requested we explore formal leadership development opportunities and provide this as part of the sabbatical learning and development programme. This we are currently facilitating through providing access to Institute of Leadership & Management qualifications, identifying potential mentors and, in the case of the President, a place on Common Purpose's Navigator programme (http://www2.commonpurpose.org.uk/home/programmes/navigator.aspx) which aims to give participants the chance to meet and challenge senior decision-makers and leaders from a variety of backgrounds; an understanding of how wide-ranging organisations, across the sectors, deal with common issues, showing the differences and similarities; an opportunity to spend an intensive learning week with peers from very different backgrounds and professions and insight into and experience of the value of diversity.

Leadership and management

Much of the popular literature on leadership focuses on charismatic examples of great generals, smug sportsmen, maverick entrepreneurs and ruthless individuals with a strategy for success which involves the input of key support staff. These staff tend to be led rather than managed and driven rather than empowered. The subtle interaction of inspiration through empowerment and achievement through development is more often eclipsed by battle orders, game plans and a personal desire to succeed at all costs.

In identifying the differences between management and leadership, Gillen refers to their etymology whereby "management" from the Latin "manus" (hand) engenders

control and a hands on approach to tasks or projects; and "leadership" from Nordic Anglo Saxon for path, route or journey spawns direction, movement, progress, change and a means to an end (Gillen 2005). In seeking results, managers are therefore seen more as a controller of people and situations whereas leaders are perceived as motivational drivers: with managers appealing to rational thought and leaders to emotional response. Gillen backs this up with neuroscientific findings which state that as the brain's limbic system processes emotional responses 60 000 times faster than the neocortex can intellectual/rational thought, then one will profit from appealing to people's hearts rather then their minds. A leader will stimulate the engagement of others, which in turn makes what the leader has said or done an example of leadership behaviour (Patching, 1999). So for example, a motivational speaker such as Henry V is far more likely to rally his troops and enthuse generations of schoolboys than is a monotonous record of battle statistics and troop movements. This of course also applies to team briefings, development meetings and annual conferences.

However, leaders alone are not enough: a general or a football manager is only as good as his or her captains and successful leadership is underpinned by sound management. For if the corps does not act, then the leader has no power and only as the consequence of the subordinates' action can the leader be judged (Grint 1995), In the workplace, performance is monitored and evaluated, that is managed, and organisational development is best served through a combination of leadership and management activities. And what of the workers? How do they perceive the psychological contract (Guest & Conway 2002)? How committed are they? Do they understand their role in the organisation (IiP Standard indicator 6)? Are they empowered

(IiP Standard indicator 7)? Are they inspired to work beyond contract?

The Taylor Report (1994) noted an inherent tension between the need to encourage empowerment and individual responsiveness while simultaneously promoting corporate cohesion and teamwork, concluding that managers will be required 'to take responsibility for their own part in corporate success'. Whereas Hussey (1988) proposes improving the effectiveness of management teams rather than individual managers through wider job awareness and better horizontal and vertical communication. In their early primer on Investors in People, Taylor & Thackwray (1995) considered the emergent IiP programme to be profoundly influential on organisational development, facilitating clearly defined and measurable L&D objectives, analysis of the organisation's existing competences and identification of additional competences required to meet organisational objectives.

IiPUK sees leadership and management as key to competitive success and has been working with the Council for Excellence in Management & Leadership to provide a framework for organisations seeking to ensure that their managers and leaders are effective as is evident from the Revised Standard and Profile 2005.

Putting the theory into practice

Benchmarking against standards such as Investors in People, chartered and/or bespoke initiatives such as the Students Union Evaluation Initiative (www.sueinitiative.co.uk) or vocational qualifications therefore provides a structure for the link between management development and organisational strategy and this in turn facilitates recognition that management development is a partnership between individuals and their line managers who, in turn facilitate management development and provide coaching

mentoring and support. However, the structure can be rendered insecure if there is no systematic analysis of the competences individuals need to facilitate organisational development and where the management development is focused on the needs of the individual rather than the organisation. Integrating the AMSU Code of Conduct with external benchmarks such as IiP Profile and SUEi should enable AMSU members to address this.

If you wish to benchmark your union against IiP Profile you can undertake an on-line diagnosis www.investorsin-people.co.uk/microsites/profile/healthcheck which provides you with a self check tool based on the responses to a range of questions providing an initial picture of how your union's approach to the management and development of people meets or exceeds IiP's defined Standard. There are 32 questions, each with four possible responses and once you have selected your answers you will be able to view a summary of your union's potential level of achievement in chart form. IiP are keen to point out that the online diagnostic is merely an indicator of potential achievement a more detailed analysis is needed if you are to understand your organisation in relation to the Profile framework.

A more comprehensive on line resource is the new Business Improvement Diagnostic Tool. This has been designed to support organisations wishing to identify possible development opportunities through continuous improvement whilst utilising the principles of the IiP Standard and good practice methods. The tool has two main sections – the business diagnostic and the organisation's training needs analysis and each can be completed independently if wished. The diagnostic helps to identify any weaknesses in HR and training strategies, presenting the findings in a feedback report which then invites the author to devise

improvement plans and to identify training need to meet those plans. It is possible to measure key organisational issues ranging from leadership and management capabilities, through customer satisfaction to return on skills investment. There is also a pro forma for a Training Needs Analysis which explains why and how it should be done whilst facilitating on-line record keeping. A particularly useful element is the summary of each section as a report which can be saved as a word document for ease of use. The tool can be viewed and reviewed at will with password access for key staff, subsections for individual services or projects and has the potential for online surveys of staff and groups. Registration and usage is free and for those unions still waivering there is no obligation to become an Investor in People – check it out on http://diagnostic.iipuk.co.uk.

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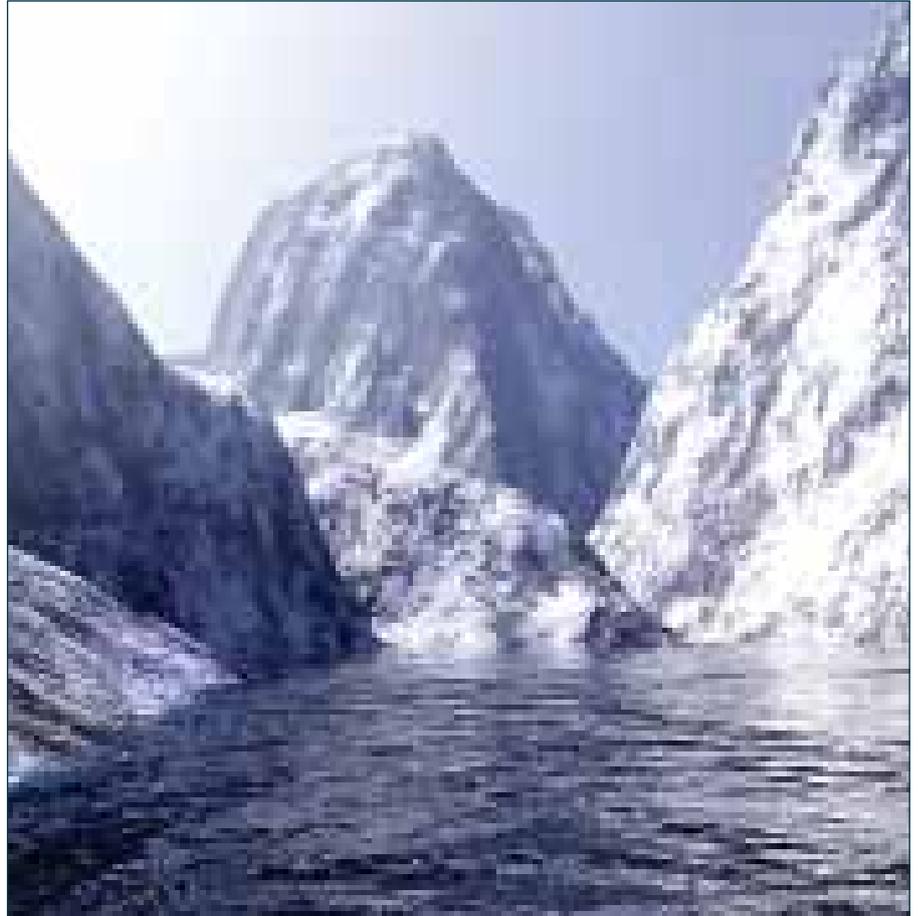
In a previous life…

Author: Martin Davey
General Manager at the University of Luton Students' Union

Before becoming General Manager at the University of Luton Students' Union, Martin Davey was employed as a Botanist and Base Commander by the British Antarctic Survey. He spent 13 summer seasons and three winters in Antarctica and two summer seasons in the Arctic, and was awarded the Polar Medal for services to polar exploration and research. In the first of an occasional series, Martin describes some of the lessons learnt from this period in his life, some of which may even be applicable to being an SU GM.

Don't believe your own propaganda

See most of the above paragraph. This sort of stuff may be useful for grant applications, but if we as individuals or organisations start to think we are great, we are on the fast track to failure. It is a human characteristic to over rate the importance of both what a team does and our part in it. Realistic self assessment, criticism and continual attempts at improvement are the foundations for moving forward. It is noticeable that top scientists and mountain guides don't spend a lot of time talking about what they have done, but look towards what needs to be done next.

Nobody is indispensable

People drop out of over wintering parties for a number of reasons. I have known teams that have worked without boat handlers, builders, radio operators, cooks and electricians, and all had very successful winters. Other people step up and fill the gaps, often in unexpected ways, and it is often the case that these demands can draw a team together. Conversely, it is better to employ no one than the wrong person. Some of the biggest problems are caused by people recruited as a last resort; people who can't really do the job or fit into base society. The results are ill feeling, low productivity and a waste of time leading to general dissatisfaction.

Be a jack of all trades

Small teams cannot have specialists in all areas. People have got to be prepared to learn and apply skills in a wide range of disciplines. A Base Commander has to deal with personnel, budgets & supplies, health & safety, maintenance and environmental matters, as well as the obvious operations & administration, and

often all in the same day. The ability and willingness to flip from one role to the next is vital, especially if the next is a problem or even an emergency.

Always have a back-up plan

It costs a lot of time and money to put a scientist into the Antarctic. This is all wasted if the primary site cannot be reached or the one vital piece of equipment fails. Much of a project can be saved if there was pre deployment consideration of alternatives. Quality work has been published by scientists who ended up in the wrong place with little equipment because they had the flexibility to undertake some simple observations and experiments and make the most of the opportunity presented.

Scientists are over committed

Often scientists only get to visit a polar site once and that for a short period. Naturally, they want to make the most of the opportunities available, and will always go for that extra sample, the one more measurement and take the additional risk. Someone else has to gently apply the brake, ensure the rules are followed and think of the effects that actions and decisions will have on those that come after. A personal accident, reckless act or damage to a site can result in similar projects being untenable in the future.

Never forget the long term vision

Just because the base is not going to get funding for all the facilities that it would like to provide, doesn't mean they can't be discussed. By talking about what we would like to do in an ideal world, we start to prioritise the resources that we do have, genuinely question what we do and think of innovative ways to get at least part way to what we want.

Any fool can be uncomfortable

An old mountain guide saying, usually aimed at people who think that there is some merit to being cold, wet and miserable on an expedition. However, it is applicable to a much greater range of situations, as there are always people who want to make life difficult for themselves. If there is a simple, easy and effective way to do a job, then that is usually the best way to do it.

Technology cannot replace talent

The latest gadgets may make life easier and faster, but they won't help if you are heading in the wrong direction in the first place, it will just get you into trouble more quickly. Technology cannot generate ideas. Knowledge, experience and time spent in old fashioned questioning and thinking are what produce innovation, whether it is in science or operations.

It's the people that matter

I could talk all day about whales & penguins, icebergs and glaciers, sunrises and whiteouts; I have hundreds of photographs of all those things and they are what everybody asks about. However, when I think about my time in Antarctica it is usually the people that I worked with that come to mind, and on the rare occasions I pull a photograph album down for my own pleasure, it is always the one marked "people and events". Ultimately, this is what made me return time and again; comradeship, common cause and a sense of what matters to us as individuals.

If you have some observations to share derived from working in a different sector about that role and /or parallels or lessons for Students' Unions please get in touch with the Agenda Editorial Team.

Any other cheese & biscuits
Latest Management Texts

AOCB brings you the reviews of the latest Management Texts.
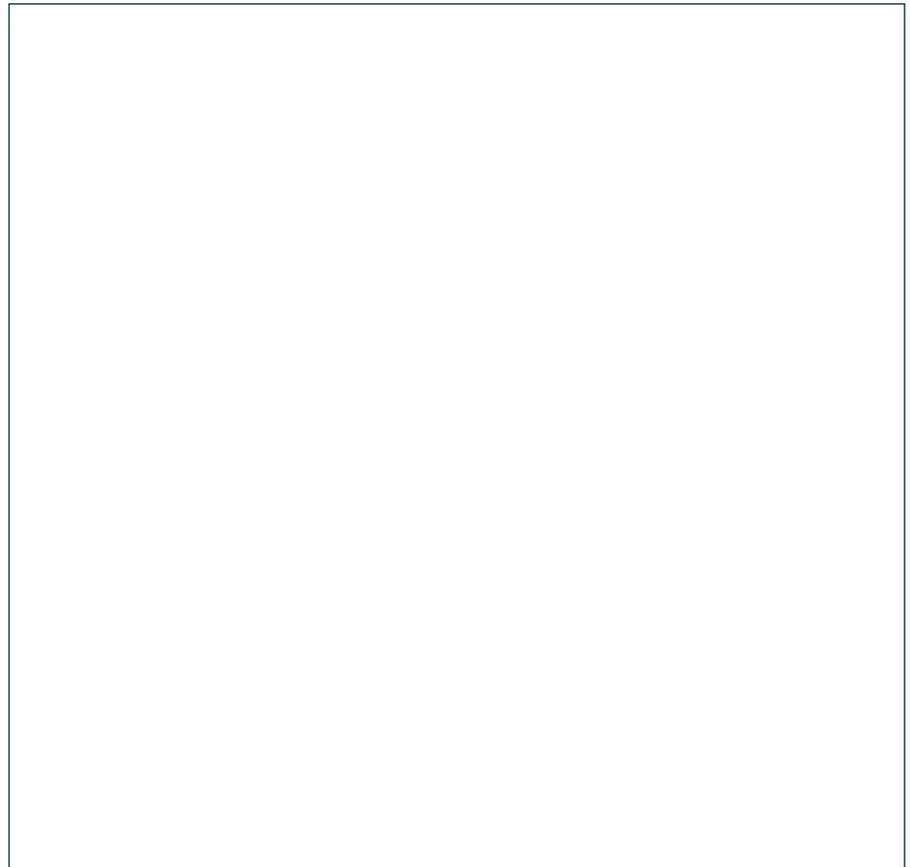
The Old Testament

This book has been with me for review for some time – my apologies to the publishers for the delay.

The book tells a well worn tale. It is one thing to build a business with your own hands (though I think the "six days" may be a bit of an exaggeration) – it is quite another to run it as a big corporation. Even with powers of omnipotence and omnipresence control is difficult. Whether an MBA would be more helpful is not addressed.

An MBA would certainly have helped with the Mission Statement. The length of 10 is about right; however "Commandments" is not the usual terminology. While there may be some gains in clarity these must be outweighed by the loss of inclusiveness. Some of the areas covered are controversial - the inclusion of the prohibition on adultery, for example was probably a mistake. There is certainly little evidence that it had the intended affect.

The book does cover areas neglected in the management literature. In the early years, there was a considerable dependence on the agricultural market and the difficulties are vividly described. It started with the wrong variety of tree planted in the first orchard, through the poor planning of the wilderness years and culminates in a wild overestimate of the milk and honey availability in the emerging middle eastern market. There are lessons for us all here.

The most controversial section is on the role of the manager. This has been a much debated topic in the literature. Is the manager mainly a leader, coordinator, facilitator, coach or a commander? Drucker even talks of the manager as an assistant! The Old Testament takes an uncompromising view on the debate:

Be still and know that I am God. (Psalms 46:8)

In attempting a survey of all aspects of the work of the manager, there is an inevitable variation of quality. I would not advise Zoo keepers to follow this advice:

"The wolf also shall dwell with the lamb, and the leopard shall lie down with the kid" (Isaiah xi. 6)

But there is a good tip on Door Staff training:

A soft answer turneth away wrath: but grievous words stir up anger.
(Proverbs 15:1.)

Overall a good, if long read – certainly unsuitable for the one minute manager brigade – with some useful insights into the problems of management. I am very much looking forward to the sequel. I hear that it presents a total change of direction with some useful tips on how to succeed in the difficult loaves and fishes market.