



Handy Handovers

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Change is built into students' unions and never more obviously than in officer positions. The 1994 Education Act decrees that these need to alter at least every two years and it is rare that at least one team member of a sabbatical group does not move on.

As it's built into our processes there's a vibrant ecosystem of induction and training programmes over the Summer. There will, however, always be the need for a handover from one officer to another. Passing on wise words, practical tips and political know-how strengthens the students' union and makes things better for students of the present and future. It can also help you reflect and prepare for the next step.

Hopefully this is a useful guide. Start early, think deeply and plan well.

Nick

Why do a Handover?

Handovers are probably just something that students' unions do like Tik Toks and mixing up STV & ATV. Before you embark on one, it's worth thinking about why they are useful.

Helping yourself

Unusually, let's start with the personal benefits. Being an officer is an incredible opportunity for growth and development. While on the rollercoaster of the job, with its highs and lows, there is little time to reflect. A handover document is an opportunity to think over that time - a chance to buy the photo at the end of the ride if we're extending the analogy.

You might be preparing for job interviews and, therefore, questions about your experiences that can be useful for a future employer. CVs or LinkedIn might need an update. Perhaps your simply making a last, valiant attempt to explain the SU to a family member or friend. In all cases getting thoughts down in the reflective part of a handover will be time well spent.

Helping others

Clearly it's helpful for your immediate successor. Despite the excellent work of SU comms teams and very clear elections briefings, it's only once you're in the role that you truly appreciate what it involves. That lived experience is so useful. And let's be honest - there are some aspects of the job itself which we don't talk about in the election period. Education officers can transform lives of thousands of students, but mainly through attending lots of meetings which can be dry. Activism is core to the work officers do, but the pathway to building a campaign can take time.

When people talk about "officer burnout" they often don't diagnose some of the reasons for this, not least because it's hard to do so when you're feeling overwhelmed. Having to start something new or deal with the unknown are likely to add to the sense of being overwhelmed. Taking out the need to create systems because something I'd already in place will clearly reduce workload. Initial insights into staff and meetings can help people with that burdensome sense of the unknown. There's clearly no easy answer to sabbaticals feeling overwhelmed in resource stretched organisations but clear guidance at the start can't be a bad thing.

Helping Union staff & volunteers

It is often said that the role of SU staff is to make the officers succeed. This might be in terms of service delivery or manifesto pledges but we put our skills and experiences into that ultimate aim. There are so many talented SU staff in the sector doing such a range of things, but the one thing they've never been able to master is mind reading.

"We just need to communicate better" is a huge cliché and in itself a phrase that always needs unpacking. However, ensuring that those supporting officers understand what they feel is always going to be useful and that means telling them - ideally throughout the year but especially at the end as they reflect.

A public handover document helps increase the knowledge passed through the organisation and makes

things better for future officers and more efficient and effective for students. Staff are likely to see through several officer teams and can track trends and ongoing issues - but only if they know about them.

Helping the University

Institutions are diverse and some staff completely understand the role of SU representatives and the way in which they interact with the organisation. But some staff don't get this. Being able to see some of the experiences of the SU might well help the university in its processes and inductions.

Ah but...

Sometimes you don't like your successor.

Sometimes you don't like your successor because they beat you in the election.

There's no point pretending this situation is easy and I'm not going to. However, I put trust in the genuine integrity of officers I've met over the years that they want their SU to succeed for students. Even if you don't care for your successor at all, you probably do care deeply about the students at your institution and want them to have the best possible representative.

Your successor can ignore your handover. They may even rail against it. But better to do the right thing and get your thoughts down. The file may even survive to be of use to a later generation.

When should I do a handover?

The best time to start your handover document is day one of the job. However, that's very unlikely to be the case so the second best time is right now.

Memory is an odd thing and never more so when it concerns emotions or feelings. A good reason to start your handover early is because it's more difficult to recollect your thoughts about your meetings or those you interacted with 11 months ago. Unless you keep a detailed diary you probably haven't written these things down. An Outlook calendar might say you met with Jane from university finance but not whether she was helpful or if you wish you'd prepared better.

If officers kept a journal of these sorts of observation throughout the year that would be great, but assuming this hasn't been done it's probably useful to think back to how things felt in the early days. You're a seasoned member of university committees, expert of union politics and experienced project manager - but you weren't when you started and of course things felt different in the early days. You may not worry about seeing the VC now, but were probably more nervous in the first few weeks after appointment. That's the audience you are writing for.

If you do want to create your handover as a living document throughout the year then I'd recommend booking in some time on a weekly basis to stop and reflect on the past few days. This is generally good practice (though not one many achieve) and will allow you to reflect more accurately on your experiences than coming back to September in June.



“When I ran for the role, I didn’t quite realise how many different experiences and responsibilities I would have. For example, and possibly of my own ignorance, I did not know I would be the student governor on the University’s Governing Body, and I did not know I would be chairing the Union’s Board of Trustees.

I didn’t realise quite how many meetings I would sit on, and how much time that would take up. I also didn’t realise how ceremonial the role can be, for example speaking at or being at nearly all of the university’s big or public events. But unexpectedly in a positive way the role has given me so much more confidence in my day-to-day life, and I have made some incredible connections and friends, including at other unions, which I never would have thought possible.

The things I expected that have been part of my role are the interactions with students, the campaigns I have been able to run and the changes that I have influenced”

Dan Bichener, President Christ Church SU

How should I do a Handover?

This guide won’t dictate the actual format of the handover document or suggest that using A4 is better than a huge flipchart or that you should PDF the whole thing rather than print it out. In fact when I talk about a “document” I don’t even think it should necessarily be something physical or read. You can podcast your wisdom or film a set of dramas if that works.

What you definitely should do is think about what would work in relation to your audience. There’s two answers to this depending on if you know who your successor is. If you do then (shockingly) asking them how they like to receive information is your first point of call. Some folks like to read things, others prefer a face to face chat. If you want your audience to receive your information then start with them.

Assuming you don’t know who you are handing over to or want a more general approach there are a few factors to consider in the format.

1. The people receiving it should be able to return to the information. If you are chatting something through ensure notes can be made or you record the discussion.
2. The information should be accessible. This means explaining acronyms and jargon as standard but also not assuming knowledge about the ways things work.
3. The information should be indexed in some way. This doesn’t have to be a cross reference of date, subject and location but knowing that this section is about meetings or you can find data relating to Freshers week “here” is great. At the basic level if you create a word doc try and search some of the things that might come up.
4. Ideally, it should be annotatable. Let your successor scribble their thoughts your in margins or add to an audio note to a recording.

A point on tone...

It’s easy for us all to concentrate on things that aren’t great and possibly even come across as cynical. You’ll have worked hard in your role and I have absolute sympathy for the need to vent or raise concerns.

There’s lots of places for this (exit interviews with CEO and trustees for example) but try and keep the handover positive. I’m not saying you shouldn’t highlight challenging areas but describing freshers week as “An exhausting experience where my feet hurt for days and I barely got any sleep” may be true in your case but won’t be very helpful for a successor trying to support new students. As an old NUS UK briefing used to say “be Tigger not Eeyore”.

What should I include in a handover?

Right, finally we're at the most important bit. If you've jumped straight here then fine but do try and look back on the reasons why you'd do a handover if nothing else.

It's very unlikely that the handover between post holders will be the only support a new officer has and you should chat with staff about what training courses will be booked for them or, in the smallest unions, look at what is on offer. If they're going to be having campaigns training then you might not need to include that area.

As with so many things planning is really key. It'll be harder to book in meetings with people a week in advance compared to a month and you put a lot of pressure on yourself to remember everything on demand if you only have a day to prepare before someone starts rather than spreading the time out over a number of weeks.

The following are suggestions of what *could* be included in a decent handover. You may find some of these sections are more or less needed than others and you might want to chat to your successor about what they'd like most attention on.

Office hygiene

When I used to work full time within a single organisation there were a few things I wanted to know on day one. If you're familiar with Maslow's hierarchy of needs then we're talking about the lowest level - physiological.

- What are the passwords, keys and codes needed to get into the offices where you work?
- Is the WiFi different from the student one?
- What are the cup politics? Do you have to bring in your own milk and will Christine from marketing hunt you down if you use her "strictly come dancing" mug without permission?
- How do you use the photocopier? How do I get expenses?
- Does Bob always bring in pastries on Friday as part of his bake off training?

The aim here is to make folks feel at home as quickly as possible and minimise the awkwardness of someone not knowing which teabags to use.

There are also the HR & Compliance bits. These will almost certainly be done by a staff member in larger unions but in smaller SUs you may want to check what the process is and who is dealing with it.

Union staff

I'm great with faces and facts but terrible with names. I also hate introducing people in case I get it wrong. This even applies when introducing people to my husband and I know him pretty well I reckon... If you suffer from this affliction then I'm really sorry but I do think you need to ensure that you introduce your successor to everyone you work with in the union outside of any document you produce. That contact can be really useful - explain who the staff member is and what they do as well as something about them (if you can) such as their favourite programme or go to karaoke tune. You aren't just reeling off a staff chart but trying to start build a team of support for the incoming officer. They can also have a chat with someone while making their tea (avoiding Christine's sacred mug).

If people work remotely you might want to do a Teams catch up or add 5 minutes to the end of an existing meeting so that people can say hello. Some individuals may get some 1-2-1 meetings; it would be odd for the VP Welfare not to meet the head of the SU advice service for example. Make sure these get booked in.

Although you aren't just reeling off a staff chart, including one in or with your document that your successor can annotate is a good shout. Gold star for you if there's photos by the names too.

Your successor almost certainly will know the key players in terms of volunteers and committee leads but you should include these too.

Annotated Role description with space for their notes

You probably sat through enough election hustings to realise lots of candidates don't always fully grasp what an officer role entails. Perhaps you didn't when you ran?

Hopefully you'll have a job description for your role. If not have a conversation with your HR support on creating one that explains what the job will typically include.

Once you have this you may want to expand on what this means in practice. I once worked in a university job where "Support Executive meeting on Monday" was one line in 24 duties. It took up about a day each week including emails out on Sunday evening.

Leave space for their notes so they can jot down who will help them book rooms or prepare for a meeting. A document which is in part created by the person it's for will be more effectively remembered.

One thing that might be difficult to describe is any Trustee role that comes with the position. There are legal implications and it's a role with collective responsibility baked in to an extent not seen elsewhere. Most students won't have seen that aspect of the role in practice and won't have met many of the other trustees involved. Give careful thought about how this is introduced, it may be an area for a staff member or trainer to support.

The next 2 weeks

Academic life is based on rhythm and, while there's obviously a huge amount of space for personal study and activity there is quite a lot of fixed points that we orientate around such as lectures or workshops and society meetings. If someone has just come from exam season this is particularly true, as you measure out your life by exam timings and revision plans as well as coffee spoons.

Have a calendar for the first two weeks laid out, with meetings and introductions as well as time for reading and reflection. Remember to think about how you successor works - if breakfast with the VC is the only option then fine but don't drop in 8ams for someone who hates mornings if you can.

Big stuff coming up

As well as the immediate you need to think of the urgent and the important. Many universities will set the costs of accommodation early in the year so it can be included in a prospectus further down the line. That's a necessity but does mean that officers can face a hugely important decision very early into the role. Preparing them on issues needing to be dealt with soon is really important.

Make sure you include the big stuff you know about this year. Have you agreed to incorporate? Is there a TEF submission to write this year? Do you know the HR director is retiring? A new Officer won't need to deal with all of this in the first month but a heads up that they will be spending December working on a big project won't go amiss for planning.

There might also be important jobs officers simply won't be aware of. In my Trustee Chairs training I talk about the importance of the CEO appraisal and setting this out early in the year. Much of Varsity planning may be needed before Christmas. Anything that someone may not know from the outside but it important should be included.

I shouldn't need to say this but throughout the preparation of the handover be aware of anything that could be a barrier for the incoming officer.

This could be access needs because of how society disables individuals but also ensuring those of faith can meet their obligations.

It might also be conscious of how people work in the rhythms of their day. I take in information best first thing in the morning or later in the day so early afternoon briefings are not good for me. Other folks don't get going until after lunch. Have a chat with your successor and consider this in your plans.



“When I ran for office initially, I had a very clear idea of what I wanted to achieve in the role and because it aligned with my past experiences, I expected to transition into the role seamlessly. Upon assuming the role, I quickly learnt that I did not know as much about what the role demanded and the Students' Union landscape in general as I thought I did, but I was still excited for a challenge.”

Chike Dike, Vice President Welfare & Community, SUBU

Introducing the university

Without understanding and reacting to the university environment, an officer team is mainly a talking shop and a good sense of the university is vital to being a good officer. As such it requires some subheadings:

People

Although we may caricature our higher education institutions as just being a set of competing bureaucracies, it is still people who make decisions. You should aim to have introductory meetings with key personnel and a dossier of facts and information for everyone whether you've met them or not.

When describing staff the Officer will work with identify what makes them tick and how they act.

- Are they pro union?
- Do they always say good things but don't follow through on actions?
- Do they hold power and resources?
- Who cares about climate issues?
- Who will only work on areas that help B3 scores or the NSS?
- Which staff members are risk adverse and which will only follow what another team member says?
- Who is new and keen to impress the union?

A huge number of sabbatical officers and union staff go on to work in universities. Who in your institution knows what it's like to have the challenges a new officer will face?

University appointees aren't the only folks you should introduce. Make sure trades union representatives are included in your list and don't fall in to the trap of only including university “big names”. We all know that VC offices are run by the executive assistants and a friendly chat with certain porters gets you into more buildings than the highest level security pass. Include them in your notes too.

Meetings

When looking at university committees that you've been on it's easy to drown in an acronym SEA (Seminar on Engaging Academia). You need to explain this but also ensure you explain a bit more about each one.

Provide the Terms of Reference if you can. Titles of committee are rarely descriptive and the TOR should indicate what the meeting does in practice.

Describe the members. You might have done this when introducing university staff but the way they interact with meetings will vary. Does the PVC glaze over in senate but lead the discussion on the audit committee?

As noted before, try and jot down your feelings about the first meetings you attended. You might be a pro at university board of governors now, but when you started were you anxious? Intimidated perhaps? Pass on that to reassure your successor that's a normal reaction but one that is often replaced with comfort and confidence.

Culture and politics

One thing that is obvious between different universities is that their culture and way of operating are very different. This is also true within institutions.

Some faculties and departments are very open to new ideas and ways of working. Some others are very traditional and focused on repeating their current operations. Some schools will be very active in UCU and the economic politics of the institution. Others are apathetic at best. The head of estates may run a benign dictatorship while there is be a semi-anarchic commune running the library. Again.

Your successor will want to navigate these different fiefdoms of the university and knowing what the culture and politics are will be very useful.

Union structures

We come now to what is probably done first in most handover. How your internal democratic and governance structures work.

Like the university meetings section, include a bit of background on the members, culture and actions of the meetings.

If there are obligations to prepare reports or give a speech then include this information alongside some examples if you can.

A plea from a bureaucrat; ground these in the actual articles, constitution, byelaws and other written rules of your union. These are there to be helpful (see my guidance on byelaw writing if they aren't). Where people don't know what the rules are they often just say what they think they should be and these then get passed down. If they need change then recommend these are changed in the handover but in the meantime pass on what they are.

Tips on working with the membership

Every officer is different and will have a different approach to working with students. The handover isn't about making sure your successor does things the same way you did but it can't help to offer some tips in case they are useful. Some questions to answer might be

1. What was useful for engaging with students? Chatting in person? Tik Tok?
2. What did you think would be useful but *hasn't* worked in terms of impact? Chatting in person? Tik Tok?
3. How did you go about collating a range of student opinions to help make a decision?
4. What were the techniques you used to build and support activism among students?

Training over the Summer should cover these areas too but your lived experience is also useful so do get these down.

Throughout preparing the document I think its is worth bearing in mind the following

1. What practical reflections and skills can you impart? Snippets like "Book out 2 hours reflection each week", "The Audited Accounts will make more sense with this guide" or "Book in at least one day annual leave in before half term".
2. What do you know now that you wish you knew when you started? What did you know or start doing in January that would have really helped back in September?
3. Finally what feelings did you have at different points in the year?

Services to Students' Unions

Officer and Trustee Training

Officer and Student Trustee Induction

Using my experience of supporting Trustee boards, my course focuses on confidence and skills building as well as understanding the roles and responsibilities of the position. Working alongside staff, dealing with complexity and operating within the SU's member led values are all covered.

This day long course runs in your union and is tailored to your needs.

Officer and Student Trustee Induction

As a University manager I watched student officer attend meetings and, purely because they didn't understand the power dynamics, fail to make their points. This training looks at the power structures of the university and the key individuals who must be identified and lobbied to make change. It will discuss the techniques officers need to consider to get the most out of meetings including preparation and tracking follow up. Outside of meetings it will look at how individuals can be influenced informally.

This day long course runs in your union and is tailored to your needs.

Being a students' union Trustee Chair

This training is focused on the issues faced by SU Trustee Board Chairs who are student officers. Recruiting and developing the other board members, managing political tensions and leading on ensuring papers are clear and accessible often come under a Chair's role.

This course is a made up of 4 online webinars plus 1-2-1 coaching.

Staff Training

Governance for Students' Union Managers

Delivered with Jacqui Clements, this course gives SU managers the skills they need to support their boards, understanding the context of legislation as well as how to prepare papers, support the chair and balance help Trustees deal with complex situations.

The course is made up of 4 seminars, an action learning set and coaching spread over 6 months and is delivered in cohorts of up to 10 from across the SU sector, giving a strong networking opportunity.

Operational Reviews

Trustee, Officer and Democracy Reviews

Combining my experience of students' unions and the Higher Education sector with my training in charity law and governance, I offer reviews of all students' union leadership and decision making operations. Always member led and my reviews offer pragmatic but innovative solutions tailored to individual client needs rather than presuming sector trends.

"Thank you for the thoughtfulness, consideration and thoroughness of your report - genuinely a joy to read and it is already proving to be hugely beneficial in developing our organisation's conversations... and finding ways through in this journey of reviewing and changing our structures"

For more details you can contact me using [this form](#) or the QR code



Nick Smith

Nick has almost twenty years' experience of supporting leaders, volunteers and staff in charities and higher education institutions with a particular expertise in governance and democratic processes. Though based in London his SU clients stretch across the UK and North America.

His work developing the model governing documents for students' unions was used as an example of good practice in the House of Lords. He has an excellent understanding of the challenges facing SUs of all sizes as campaigning, representative and service delivery organisations. He is company secretary of five students' unions giving him a pragmatic experience to live issues faced by student representative groups.

He has been an executive officer within a leading UK medical school and assistant registrar for governance at Queen Mary University of London. In these roles he developed an understanding of universities and their internal processes and perceptions of students' unions.

He was awarded a distinction (84%) in the Chartered Governance Institute's certificate in Charity Law & Governance and is an [Advance HE associate](#). He writes a regular [Wonkhe column](#).

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