{Role} Handover Document

{Name of Group}

# Role Description

*In this section, you should include a list of all the main tasks and responsibilities that are specific to this role. It may be helpful to comment on how long someone should expect to spend each week and any busy points in the year etc.*

# General

*In this section, you could include a rough calendar for the year, how your group/committee operates (such as how often you have had committee meetings), anything specific to your group such as where equipment is stored, which venues you use etc.*

## Event example

* Budget for the event and what the actual costs were, including where income was generated and anything that you’d recommend doing differently next time regarding the finances of the event
* How the event was run, what equipment/preparation was needed, when and where it was held, how many people attended and who attended (e.g. lots of postgraduates, not many final years), who ran/organised the event and what did they do, a rough timescale of preparation
* Any feedback (from the event organiser, committee, attendees etc.)
* Anything else you would do differently, keep the same
* Any ideas you have for future years or things you were planning to do but ended up not doing

## Passwords, access to files etc.

Social media passwords, any email/file storage passwords, how files are stored/organised, documents to be aware of, when data is due to be deleted

## Key people and organisations

Who your group (and particularly your role) works with e.g. SU and University staff, any external/national organisations, sponsors

## Strategic planning

Any long-term goals and plans, how your role fits into your group’s strategic plan, any targets/benchmarks for longer-term initiatives so that the role holder can keep track of progress? Any ongoing projects they should continue?

## Processes

How to do each of the tasks in the role description e.g. how to contact members, how to advertise an event, how members sign up to a session

## Challenges

Any challenges you have experienced this year? Any risks/threats that someone should be aware of in this role (including any plans for how to tackle them)? Anything that could be changed to make this role more manageable? Any times of the year that were particularly busy?

## Thoughts and Ideas

Anything you would like to have done this year but didn’t get round to? Anything different you think the next role holder should do/try? Any ideas you have had suggested by members/other committee members/others? Anything you think your group should do differently in future? Any top tips?

## Appendix – General guidance for all committee roles

**Rules and regulations:**

The SU’s [Byelaws](https://www.bristolsu.org.uk/support/su-governance-policy/key-documents) state some of the main requirements of student groups. Sports clubs and societies must have a minimum of 30 members each year and a committee, consisting of at least the 4 mandatory roles, must be elected each year. Student groups, and their members, must also abide by the SU’s [Code of Conduct](https://www.bristolsu.org.uk/resources/bristol-su-code-of-conduct), which sets out expectations for behaviour.

**How to use your webpage:**

Once you are set up with admin rights, you’ll be able to login to the SU website and access the dashboard for your group. Information on editing your webpage, setting up membership prices, setting up events etc. can be found in the [Managing Your Webpage guide](https://bristol-su-development.learnworlds.com/course/managing-your-bristol-su-webpage).

**Memberships:**

Please note that memberships must terminate by the end of the academic year. This means that multi-year memberships are not permitted. All committee members must purchase the same membership option as they would if they were not on the committee.

**Data protection:**

Student groups must collect, store and delete data in line with data protection regulations. Detailed guidance on data protection can be found on the [online guide](https://bristol-su-development.learnworlds.com/course/essential-gdpr).

**Associate Memberships:**

Non-University of Bristol students can join student groups if the student group allows them to. These individuals (UWE students, alumni members, members of the local community etc.) must first purchase an [Associate Membership](https://www.bristolsu.org.uk/groups/associate-membership-group-1e45) to join the SU and they can then join groups that allow Associate Members to join. Associate Members cannot vote in committee elections or fill a mandatory committee position.

**Making payments:**

The main two ways to spend student group funds are expenses and invoices. Expenses is where a student gets permission from the committee to spend their own funds on behalf of the group and then claim that money back. It can take a few weeks for payments to be made and so expense claims are not recommended for larger amounts. Alternatively, you can usually ask a supplier to provide an invoice and a signatory can then send this through to the Student Services Team to be paid. This is then paid directly from the group’s account to the supplier.

**Room bookings:**

Aside from regular room/facility bookings, groups can also make a one-off booking of an [SU room](https://www.bristolsu.org.uk/support/tools-for-committees/running-events-activities) or a [University room](http://www.bristol.ac.uk/directory/learning-facilities/room-booking/student-room-bookings/#:~:text=Student%20Groups%20registered%20with%20the,%40bristol.ac.uk.).

**Grants:**

Sports clubs and societies can apply for [Bristol SU Group Grants](https://www.bristolsu.org.uk/support/tools-for-committees/group-finances/bristol-su-group-grants) and can be awarded a maximum of £3,000 per year. It’s worth noting that grants must be spent within 3 months and applications are competitive.

Student groups can also apply for [Sustainability Grants](https://www.bristolsu.org.uk/support/tools-for-committees/group-finances/bristol-su-group-grants) of up to £500 for activities involving sustainability and/or tackling the climate emergency.

Students can apply to the [Activity Hardship Fund](https://www.bristolsu.org.uk/support/tools-for-committees/group-finances/activity-hardship-fund) for up to £100 to go towards their participation in Bristol SU activities, such as membership fees, essential equipment or ticket prices.

**Awards and Accreditation:**

The [Accreditation Scheme](https://www.bristolsu.org.uk/student-groups/balloon-accreditation-scheme) recognises and rewards student groups that provide an excellent experience to their members. There are twenty criteria focused on the activities of a well-run group.

[Student Group of the Month](https://www.bristolsu.org.uk/student-groups/group-of-the-month) runs during term-time and recognises groups that have gone above and beyond.

The Society Awards, Sports Awards and Volunteering Awards recognise Bristol SU’s best groups of the year. There are also national awards such as the National Society and Volunteering Awards.

**Support:**

You can [book a Development Meeting](https://www.bristolsu.org.uk/support/tools-for-committees/training-support) with Bristol SU’s Development Team to discuss any aspect of your role or student group including new ideas, issues your group is having or committee conflict.

You can book a [Finance Meeting](https://www.bristolsu.org.uk/support/tools-for-committees/training-support) with the Student Services Team to better understand Bristol SU’s financial processes.

**Stepping down from your role:**

If you wish to step down from your committee role, you just need to let either the committee or the SU know. If you contact the SU, they will get in touch with the committee. The remaining committee members are then responsible for filling the vacant role or, if a non-mandatory role, covering the responsibilities of the role between then for the remainder of the year. If possible, it can be helpful to explore alternatives to stepping down first and also to provide a handover to the person(s) taking on your role/responsibilities.