Project Leader Training 24-25

Welcome ☺

**THE SU
UNIVERSITY
OF BATH**

Introductions

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Introductions

Quick Fire – 5 Minute intros

- Introduce yourself
- Which project do you lead
- What are your hopes for your project

Handovers

You should have:

- Logins/social media
- Contacts
- Events
- Timelines/key dates
- Tips
- Successes
- Things to improve on
- Key documents (including risk assessments)
- Marketing materials
- Covid impact

If you have any new ideas, please come and chat to us or approach your committee – remember we are student-led!

Key Dates

Key Dates (TBC)	Notes
Oct	Freshers week!
Oct	Be Well Week
Nov	Movember
Dec	Festivities/Winter at Bath
Feb	Refresh week
Feb	Student Volunteering Week
March	Women's Week
March	Elections
Apr	Awards
May	New committees training
May	End of Year

[University Academic Calendar](#)

Project Planning

Project Planning Template

Project Planning	Notes
Aims and Objectives	• What do you want to achieve? • Have a broad aim to display the intention of your project • Narrow down your goals/objectives/values
Partners	• Working with charities - good practice
Timelines	• What are your deadlines
Volunteer Recruitment	• Allocating roles • Best practice
Fundraising	• Laws
Finance	• Budget
Marketing	• Website • Data protection • Photography permissions
Health and Safety	• Risk Assessments • Food Hygiene • Safeguarding
Evaluation	• How will you document your project? • Final evaluation meeting • Preparing handover for next year

Aims and Objectives

Aims and Objectives

For the next 5 minutes, write down:

- What is the difference you intend to make?
- Who do you want your project to impact?
- Who is your audience?
- What activities do you want to include?

First Steps

First Steps

- Meet with Committee to discuss plans
- Speak to partner organisations e.g. charities
- Make sure your aims align with your partners values
- Find out what support the SU team can offer
- Which documents will you need to complete and the deadlines for these

Event Planning

Sustainability

- Aim to run sustainable projects
- Buy less
- Buy better
- Share workload
- Prepare your handovers
- Forward planning – who could take over?

Budget

- Look at group finances/available funding if relevant
- Set a budget and ensure you stick to this
- Think about contingency

SU

Event Planner

The Event Planner:
[Organise a New Event (thesubath.com)](thesubath.com)

- Encourages you to think about all aspects of your event
- Keeps you in contact with your area staff
- Ensure you have submitted all your paperwork
- The Event Planner gets submitted to the staff support for your area
- Visit thesubath.com/new-event

Do I need to submit an Event Planner?

EVENT	YES	NO
Requires an online product	Yes	
Requires tickets	Yes	
Costs over £2,000	Yes	
Over 200 guests	Yes	
Has external speaker(s)	Yes	
Is a show or performance	Yes	
Cake sales	Yes	
BBQ	Yes	
Food event - Pizza etc	Yes	
SU Socials (PLUG and TUB)		No
Small fundraisers (not cakes sales)		No

Event Planner Timeline

Activity or Event	When to submit Event Planner
On campus activity or event	3 weeks in advance
On and off campus shows	3 weeks in advance
Cakes / BBQ's	3 weeks in advance (including Food/BBQ health & Safety form)
Off campus activity or event (no contract)	4 weeks in advance
Off campus activity or event (contract)	6 weeks in advance
External speakers (online or in-person) Read more here	At least 4 weeks in advance (including external speakers form)
Overseas trip (please call into Societies office before booking)	At least 6-8 weeks in advance

Fundraising

Fundraising Toolkit

Fundraising Toolkit (thesubath.com)

This Fundraising Toolkit has been created by RAG to provide guidance on ensuring your fundraising complies with the law and SU policy

Fundraising and the Law

- Make sure your donors know which charity they are donating to

- Council permit for collecting money in town

- You CANNOT sell items in town

- Profits vs Proceeds

Health & Safety

Take 5 minutes to write down any risks you might encounter

What could go wrong during your project?

SU

Health & Safety

- Risk assessments
- Food safety
- Laws & restrictions
- Working with the public
- Safeguarding
- Reporting any concerns
- SU good practice
- [Health and Safety (thesubath.com)](http://thesubath.com)

Recruiting Volunteers

- Use opportunities page
- Utilise Teams
- Run recruitment events
- Hold info sessions
- Induction talks
- Training sessions
- Promote your events
- Speak to Volunteering Team about upcoming opportunities

Volunteer Management

- Ensure all volunteers feel prepared and have necessary training and checks
- Joint responsibility with external partner (e.g. charities)
- Keep volunteers in the loop
- Share project plan and risk assessments
- Communicate problems to your team so they can be dealt with quickly
- Be solution focused

[Volunteer Best Practice](#)

Communications & Marketing

Meetings

You should be meeting each other regularly as well as:

- Committee

- Volunteering Team

- Finance

- Marketing

- Keeping in touch with your volunteers!

Creative Marketing

Split into pairs with someone from a different project

Come up with a creative way to market the project of your partner

You have 5 minutes ☺

Promotion

- SU main social media channels
- Your group's social media channels
- Tap in to your partner's audience
- Other relevant groups
- SU marketing can help with Canva templates and branding – Marketing (thesubath.com)
- Host promotional events:
    - The Parade
   - The Edge
    - The Library

Shout about it!

Tone

- Be positive, friendly and celebratory
- Send regular encouraging and positive communication
- Share your team's successes
- Representing your group, the SU & the University
- Marketing Team can offer support and proof reading

GDPR

- Only take essential information
- Ensure you have necessary photo permissions (unsplash)
- Be clear on what you will do with email addresses and only send out information you have told people they will receive
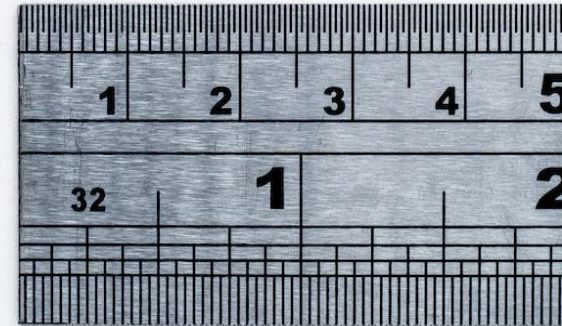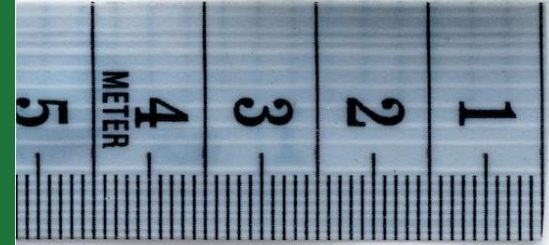- https://www.bath.ac.uk/corporate-information/gdpr-new-data-protection-rules/
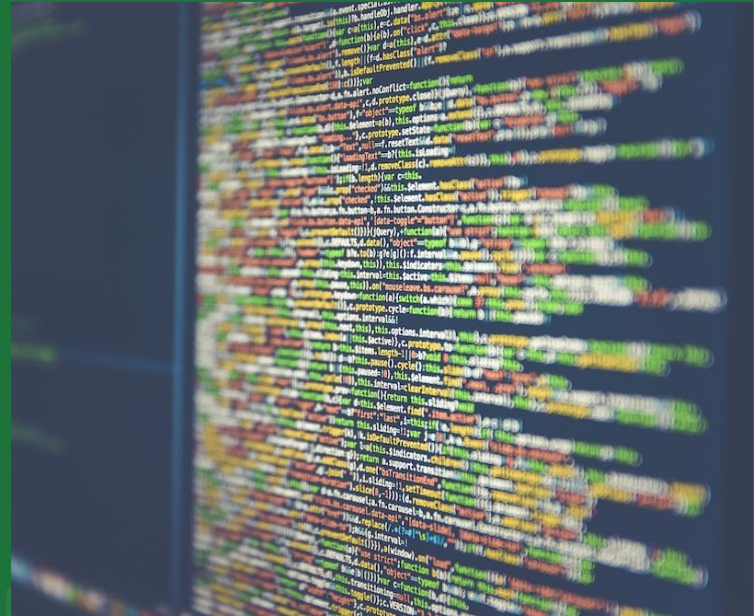
Review

Measurement Tools

Remember to Document your Project:

- Interviews/Testimonials
- Feedback forms
- Photos
- Videos
- Audio
- Focus group discussions
- Observations
- Quotes
- Statistics/Data

Evaluation & Handovers

- Book evaluation meeting!
- Collecting stories and quotes throughout
- Prepare a thorough handover document
- Note any issues you encountered
- Work to follow up on

*This will come sooner than you expect!

Resources

Training Available

- Moodle - University of Bath Moodle
- Student Leader Hub, training resources - Student Leaders (thesubath.com) (includes H&S docs, Risk Assessments)
- Health and safety training - Health and Safety (thesubath.com)
- Tailored training needs: Book an appointment with SU Staff and we can direct you

Useful contacts

Remember the Students' Union is here to help you so if you need any advice or guidance do not hesitate to contact us:

- ➢ Volunteering Office – volunteers@bath.ac.uk
- ➢ V Team – vteam@bath.ac.uk
- ➢ RAG – rag@bath.ac.uk
- ➢ Marketing – sumarketing@bath.ac.uk
- ➢ Website – suweb@bath.ac.uk
- ➢ Societies – susocieties@bath.ac.uk
- ➢ Sport – susport@bath.ac.uk

Useful Resource Links

- Management Handbook
- Fundraising Toolkit
- Event Planner Help
- SU Training Moodle Hub
- Volunteering website
- Student Leader Hub
- Generic Resources Page
- Marketing
- What's on