THE STUDENTS' UNION (THE SU) PROJECT & CAMPAIGN MANAGEMENT POLICY

Vision: To deliver successful and well-managed projects and campaigns that support the core purpose of The SU.

Rationale: The SU believes having a clear framework will ensure appropriate planning, approval and oversight of projects and campaigns so that The SU delivers impact and return on investment.

This policy exists to ensure there is an effective framework for this purpose.

Projects/Campaigns this Policy applies to

This policy applies to any project/campaign which meets any of the following criteria:
- new projects/campaigns not included within the annual planning process;
- all projects costing over £1000;
- campaigns and initiatives where SU endorsement or support is required.

Stage 1 Planning: Project Brief

The person instigating the project/campaign (client) will seek one of the following people who is ultimately accountable for the successful delivery of the project/campaign (sponsor):
- Chief Executive;
- Deputy Chief Executive;
- Head of Department/Manager;
- SU Officer.

Using insight and data, the client and sponsor must together complete and submit a project brief to the Leadership Committee for approval.

The client brief will include:
- summary of current situation;
- main objectives;
- how it supports The SUs' strategic direction;
- budget and resources needed;
- target audience;
- measured outcomes;
- external factors that might impact on the project/campaign.

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Stage 1 Approval: Leadership Committee

The Leadership Committee will meet to review any project brief received and determine if the project/campaign being proposed is:
- in line with The SU's purpose and strategic direction;
- achievable in consideration of other demands and priorities;
- affordable and a sound use of time and resources;
- going to deliver benefit in line with the core purpose of The SU.

The Leadership Committee may decline or request more information for any brief which does not meet these requirements.

If the Leadership Committee gives approval to proceed they will:
- appoint a project manager *(who can be the client)* to oversee and carry out the proposed project/campaign;
- identify any additional support and resources for the activity;
- determine if a business case is necessary and, if so, where it should be submitted.
  - Chief Executive (below £5,000);
  - Leadership Committee (between £5,000 to £10,000);
  - Finance & Audit Committee (above £10,000 or/and medium risk identified);
  - Board of Trustees (above £50,000 or/and medium risk identified).

For complex projects/campaigns requiring a business case the Leadership Committee may:
- require the project manager be project management trained;
- refer to the Finance & Audit Committee or Board of Trustees even if it does not meet the criteria above.

Stage 2 Planning: Business Case *(where required)*

The project manager, in consultation with the client and sponsor, will draft a business case for the project/campaign.

The business case will outline:
- desired outcomes;
- benefits expected;
- options to accomplish desired outcomes;
- expected costs and income;
- dependencies;
- timescales for completion;
- any key risks identified;
- how outcomes will be evaluated.

Stage 2 Final Approval *(where required)*

Either the Chief Executive, Leadership Committee, Finance & Audit Committee or Board of Trustees will review the business case as previously determined by the Leadership Committee under Stage 1 Approval.

Whoever reviews the business case will determine:
- if further information/clarification is required before a decision can be made;
- whether the project/campaign proceeds or not.

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Monitoring Ongoing Projects/Campaigns

The project manager will submit regular progress reports to the Leadership Committee until the project/campaign is completed.

The progress reports will include updates on:
- achievements to date
- risks;
- actions taken;
- issues that have arisen (i.e. delays/going over budget);
- decisions that need to be made.

Where the Leadership Committee identifies concerns relating to a project/campaign it reserves the right to cancel it with immediate effect.

End of Project/Campaign Report

The project manager will complete and submit an end of project/campaign report to the Leadership Committee once the project/campaign has been completed.

The end of project/campaign report will, as a minimum, include:
- any changes made to the successes being measured;
- key successes to be communicated to stakeholders;
- key challenges encountered;
- key lessons learnt for future projects/campaigns.

Reporting to the Board of Trustees

The Leadership Committee will submit a report to the Board of Trustees annually at the end of each academic year which will:
- list all the projects/campaigns carried out over the last year;
- analyse their success rate;
- summarise the lessons learnt.

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