



# **Annex III to Membership Strategy: Handbook for a Study Visit**

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## **1. Introduction.**

This document outlines the process of conducting a study visit (SV) to an applicant National Union of Students with the purpose of assessing NUSs readiness to meet ESU's membership criteria. The SV is an opportunity for the assessed NUS to show and prove that it is ready to become a member of ESU.

The purpose of SV is to **determine whether an NUS fulfils the ESU membership criteria and, consequently, to provide the Board with a recommendation about NUS membership.** In order to do this, the SV team should use all opportunities at their disposal to check how the member in question operates.

The SV must be carried out in accordance with the highest professional and ethical standards, respecting the confidentiality of information received.

## 2. Study Visit Team.

The SV team consists of 3 to 5 people in total - 2 to 3 members appointed by the Board, one member appointed by the EC if necessary and the Coordinator for Membership issues.

The members elected to do the SV nominate their representatives respecting the **gender balance**. Representatives are chosen to ensure a **regionally balanced SV team**.

Once the SV Team has been elected, the Coordinator for membership issues must call for at least one online meeting before the SV takes place.

The purpose of this meeting will be to prepare the logistics of the SV as well as to share knowledge about the context of the country/region where the Union comes from, reflect on the higher education system and its institutions to be able to understand how the union operates. Moreover, the meeting must clearly set up the task division (in accordance with the membership criteria) between the members of the SV team.

During this meeting at least the following topics should be discussed:

- Meeting the team.
- Presentation of the application.
- State of play in regards to documents (missing documentation, clarification, etc).
- Logistics of the visit.
- Task Division during the SV.
- Responsibilities after the SV (reporting schedule, discussion and vote on the recommendation).

During the preparation phase, the SV team must get familiar with the **Statutes and Standing Orders of ESU** and comply with them while carrying out the SV as these two documents set the whole procedure. The SV team must evaluate the organisation in accordance with **ESU membership criteria** as stated in the Statutes and developed in the Membership Strategy.

The Coordinator for membership issues is responsible to carry out the process taking into account the estimation of the members of the SV team. The SV team is required to write an SV report that will be presented to the BM as a reference document for the Membership Application discussion

Every member of the SV team has one vote on the recommendation to grant the full member status or not. The recommendation needs a simple majority of the votes ( $\frac{3}{5}$ ) in favour or against.

### **3. Documents related to the Study Visit.**

The study visit team has the right to request any documents related to the functioning of the assessed NUS. All the **necessary documents must be requested at least 60 days before the date of the study visit**, and they **must be delivered at least 30 days before the study visit**. **The study visit team can request additional documents after the deadline in accordance with the Membership strategy.**

The following documents might be requested by the SV Team:

- Statutes and Standing Orders.
- Plan of work of the current and past year.
- Finances and budget.
- Agreements and memorandums the organisation have (with HEIs, ministry or other relevant institutions).
- Any minutes from the recent statutory meetings of the organisation.

The **study visit team must study the delivered documents, and prepare notes about available information before the study visit**. Provided documents must be made available to the Board according to the normal procedures of agenda point discussions. The documents shall be kept confidential.

### **4. Meeting with stakeholders**

In order to determine all the necessary information about an NUS, **the SV team should hold meetings with stakeholders, that include but are not restricted to the following list:**

- NUS presidency and executive committee, NUS board members or equivalent bodies
- Relevant organisations in the country related to student issues
- Partner organisations of the assessed NUS
- Representatives of various local students' unions or individual members, that they find relevant, but preferably not only those recommended by the assessed NUS
- Students who are not members of the NUS, and representatives of other student organisations, if they exist in the country

- State education institutions, such as the ministry responsible for higher education, stakeholders involved in education, quality assurance agency, research institutions
- Representatives of other relevant organisations working in the area of higher education
- Independent NGOs engaged in higher education
- International institutions working for education, such as the local UNESCO or Council of Europe department, foreign embassies.

The information gathered during the meetings with external stakeholders should be evaluated in its entirety and reflected in the report for the BM. With the proposals from the SV team, the coordinator for membership issues should inform the applicant union about the list of the stakeholders the SV team would like to meet. The final list of the stakeholders to meet should be agreed on at least 14 days before the SV.

Should there be any involved parties or stakeholders the study visit deemed necessary to meet but the NUS was not able to organise, it is the competence of the Coordinator for membership issues, within the limits of its capacity, to organize the meetings no later than 10 days after the visit.

The meetings should be organised in a constructive and not restrictive manner. The SV team has the liberty to address relevant questions to the external parties without supervision from the side of the applicant union. The meetings with the external parties take place without the presence of the applicant union in the room. The meetings are moderated by the SV team with the internal agreement of task division of chairing, minuting, etc during each session.

## 5. Time frame.

The schedule and the detailed program for the **study visit are to be proposed by the assessed NUS at least 30 days before the study visit**, and it should be agreed upon between the team and the NUS at least 14 days before the visit.

The study visit should last around 5 or 6 days including arrival and departure days. The best practice would be to have 3 to 4 days for meetings and other kinds of activities proposed by the study visit team and the host union.

## 6. Practicalities.

The assessed union must guarantee that the study visit team will have:

- Work-friendly accommodation
- Guidance about the local transportation
- Time and space for internal meetings
- Access to office supplies if needed, such as a printer
- ...

## 7. Report.

The **study visit report must be done as an unbiased report**, which will be easily comparable with other study visit reports, and it should consist of at least the following elements:

- Overview of the current political situation in the country, in relation to the higher education system, which has to include the overall structure and financing of the higher education system and any recent major changes in the national higher education area
- Summary from all the meetings held during the visit
- Reports on each of the membership criteria, according to the organizational capacities framework
- Constructive feedback to the assessed NUS identifying areas to develop.
- Any additional information that might be worthwhile for a more objective assessment of NUS membership;
- Conclusion and recommendation to the Board, including one on assessed NUS's membership status

In case of dissenting opinions amongst the study visit team, **each team member has the right to write a statement that has to be included in the study visit report.**

The **study visit report should be finished no more than 30 days after the study visit ended**, and **delivered to the assessed member, which has the right to comment on the report until 15 days after the delivery of the report.** The study visit report should be shared with ESU's Executive Committee no more than 50 days after the study visit ended.

The **Study visit report**, together with the assessed members' comments, **must also be delivered to the ESU Board.**