

# Leeds Trinity Students' Union Sabbatical Officer Support & Expected Behaviour Framework

(Approved by the Board of Trustees May 2017)

## Introduction

The following document lays out some guidance for how to manoeuvre the many hats that Officers wear. These have been developed in consultation with the sabbatical team. Officer performance will be assessed against this framework; and held accountable through Student Council and the Board of Trustees.

You will find the following sections

1. The role of the officer
2. Working as a team
3. Office rules
4. Attending meetings
5. Expenses
6. Scrutiny

## The Role of the Officer

Officers have a broad role and are expected to wear many hats and the situation will depend on which hat is appropriate for you to wear at that time. In some instances you may have to wear more than one hat and you will have to gauge the best course of action at the time depending on the outcome that is required or desired. Broadly your role is split into representation, trustee, holders of public office & team member.

Staff are there to help you in this process and based on experience can help scenario plan different approaches to decision making, critique different outcomes and identify different risks and benefits.

### Representation

As covered in your induction, your primary role is as an elected representative of the student body. This means you are expected to give the student perspective in your dealings with the University, as well as speak on behalf of the student body when appropriate. Your work both individually and collectively as a team should enhance the student experience at Leeds Trinity. The two ways you fulfil this role are:

#### **Formal**

Through engagement with University governance. This means attending a variety of committees and meetings, ensuring that the student view/ voice is effectively used when decisions are being made. These meetings happen at School as well as institutional level, and also often involve project boards or strategic committees. Ensuring you are well equipped to deal with the

discussions is vital, so preparing properly, reading papers and speaking with students about the issues prior to your attendance is crucial.

### Informal

Through lobbying as well as assisting individual students with their concerns. This form of representation requires excellent relationship management skills as well as an understanding of negotiation and persuasion techniques. Students will likely only see this side of your representative role so it is important that you are visible, exhibit professional conduct at all times and available to support them when needed.

### Trustee

The ultimate role of a Trustee is to safeguard the organisation and ensure a sustainable future by ensuring legal and policy compliance. The task of a trustee is to serve organisational interests, not personal interests. This is where some conflict can occur due to your other hats including personal projects together with issues raised through representative processes, however this is where the balance of the trustee board including External and Student trustees adds another check and balance.

## The Governance Jigsaw – The Essential Trustee (CC3)



#### It's about knowing:

- what your charity can and can't do within its purposes
- how your charity is fulfilling its purposes and benefiting the public
- what difference your charity is really making

#### It's about being:

- familiar with your governing document
- up to date with filing accounts, returns and any changes to your charity's registration details
- aware of other laws that apply to your charity

#### It's not about being:

- an expert - but you do need to take reasonable steps to find out

#### It's about:

- making balanced, informed decisions
- recognising & dealing with conflicts of interest
- ensuring trustee benefits are allowed
- being prepared to question and challenge
- accepting majority decisions

#### It's not about:

- preserving the charity for its own sake
- serving personal interests

#### It's about:

- managing risks, protecting assets (reputation) and people
- getting the resources your charity needs
- having and following appropriate controls and procedures
- dealing with land and buildings
- responsibility for, and to, staff and volunteers

#### It's about:

- using your skills and experience
- deciding when you need advice
- preparing for meetings
- getting the information you need (financial, management)
- being prepared in case something does go wrong

#### It's about:

- meeting legal accounting and reporting requirements
- being able to show that your charity complies with the law and is effective
- being accountable to members and others with an interest in the charity
- ensuring that staff and volunteers are accountable to the board
- welcoming accountability as an opportunity not a burden

Within your legal duty It's vital that you:

- Act in your charity's best interests
- Deal with conflicts of interest
- Manage your charity's resources responsibly
- Implement appropriate financial controls

- Manage risks
- Act with reasonable care and skill
- Take appropriate advice when you need to, including seeking advice from the General Manager and staff team

### Holders of Public Office

As elected officers you are akin to those individuals that hold public office such as Members of Parliament and Local Councillors. The committee for standards in public life developed seven principles (known as the Nolan Principles) that provide a framework that are the basis for those in similar positions.

**Selflessness** Holders of public office should act solely in terms of the public interest. They should not do so in order to gain financial or other benefits for themselves, their family or their friends.

**Integrity** Holders of public office should not place themselves under any financial or other obligation to outside individuals or organisations that might seek to influence them in the performance of their official duties.

**Objectivity** In carrying out public business, including making public appointments, awarding contracts, or recommending individuals for rewards and benefits, holders of public office should make choices on merit.

**Accountability** Holders of public office are accountable for their decisions and actions to the public and must submit themselves to whatever scrutiny is appropriate to their office.

**Openness** Holders of public office should be as open as possible about all the decisions and actions that they take. They should give reasons for their decisions and restrict information only when the wider public interest clearly demands it.

**Honesty** Holders of public office have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.

**Leadership** Holders of public office should promote and support these principles by leadership and example.

### Employee

In addition to being a holder of public office you are also an employee of the Students' Union. You have contract of employment which imposes both rights and duties.

## Working as a team

The first aspect of this is team work. The officer role is one filled with pressure and you will need the support of your colleagues to achieve maximum effectiveness. You are part of several teams. The team of the Board of Trustees, a Student Council team, the team of a sabbatical officer partnership, and a wider team with an experienced staff team. In all teams there are various stages of cohesion, conflict and renewal. This should be expected, embraced and acknowledged. Below are detailed some of the positive characteristics of teamwork:

<b>Advocacy &amp; support</b>	Advocating for your team mates to the staff team, university, student body and other colleagues.
<b>Dignity and respect</b>	Treat each other with dignity and respect at all times
<b>Positive challenge</b>	There will be occasions when you do not agree or priorities may clash, when this happens you should challenge each other one to one in a positive way seeking win/win solutions
<b>Democratic</b>	The Elected Officer team and Student Council Team was elected democratically and should exercise democratic decision making
<b>Celebrate successes</b>	Acknowledge and celebrate the successes of your team mates
<b>Values</b>	Uphold and champion the Union values <ul style="list-style-type: none"><li>● <b>Exceptional</b></li><li>● <b>Inclusive</b></li><li>● <b>Personalised</b></li><li>● <b>Students First</b></li></ul>

## Office Rules

### Working hours & presence in the office

Normal working hours are between 9am and 5pm, as per the contract of employment, although there is some flexibility around this. On a normal working day if your calendar shows that you are not busy in a meeting or another area of the campus you will be expected to be contactable within reason. It is expected that you will spend time in the office during the course of the week to make yourself available for student drop ins. It is inevitable there will be occasions where you have a pre-scheduled work event for a time outside of these hours. In these cases you are encouraged to work your hours around this event. For example if you have an event at 6-8pm to work a 12pm – 8pm day as opposed to a 9am – 5pm day.

In order to assist the recording of leave you should make it known to the team in advance of any leave you are taking and update your holiday form on the shared drive. It is the responsibility of the officers with support from the staff as and when required to ensure that meetings and critical activity is covered during any annual leave taken by officers.

### **Prioritising**

By the very nature of your role, there will be occasions where you will be invited to conflicting scheduled meetings and activity. In these occasions it is up to you to consider what meeting most benefits students and if need to be to ask other members of the team to attend the additional meetings instead. There will also be a range of appointments that it is nice to be invited to but may not be particularly useful.

### **Microsoft Outlook & Communication**

You should keep your outlook calendar up to date with all meetings and share the details with your fellow officer and staff team. Where a meeting is confidential you should mark it as a private appointment on Outlook.

You should be contactable during working hours on your contact number as provided by you at the point of joining the Union. At times when you are in meetings you may not be able to answer the phone but you would be expected to return any calls as soon as reasonable practicable.

### **Sickness reporting**

If you are not going to be able to make it into work you should inform the General Manager before 9.30am on the start of the working day. Should you have a meeting before this time you should call or email ahead. They will then notify the rest of the team and check whether there are any meetings that need to be covered.

### **Holiday**

Your holiday entitlement is laid out in your employment contract. You are strongly encouraged to take some leave over the summer period. The first semester between September – December is usually the steepest learning curve and to support you being successful in the role it is recommended you go into these months well rested, having taken some of your annual leave.

## **Meetings**

All meetings should be attended on time and you should be prepared for the meeting having read any paper work issued in advance. During meetings you should engage in the meeting fully; whilst it can be tempting to check e mail and keep up with what is happening outside the meeting this can draw attention away and you may miss relevant information. If you are not able to attend a meeting you should send your apologies in advance unless an emergency arises.

Whilst it is accepted that unavoidable circumstances may arise which delay your arrival at a meeting or result in late apologies these guidelines would be expected to be followed in the majority of instances.

If an Officer is unable to attend a meeting, in particular University committee, a fellow officer should take their place or in exceptional circumstances ask a staff member to be 'in attendance' to report back. Union Team meetings should be used to keep each other up to date on key meetings and activities so that a seamless approach is presented at all meetings irrespective of who attends.

## Training & Development

Sabbatical Officers are sent to NUS Sabbatical Officer Development events including a residential in the summer and have a week's paid training before starting their roles in the Union with the staff team. They are also participants in the Student Council Residential. Officers will complete a Personal Development and Objective setting template created by an external provider with support from the General Manager each summer which will then be presented to the Board of Trustees and Council at a meeting in September/October. Catch up sessions with the General Manager take place monthly where the latter will scribe progress on objectives for officer Board reports.

Further ad hoc discussions, meetings and training are encouraged and implemented as appropriate.

## Expenses

Reasonable expenses incurred in performing the duties of the role will be reimbursed in line with the Financial Procedures. This procedure covers the parameters within which expenses will be reimbursed. This document provides some additional guidance on approval and claiming of expenses

<b>Approval</b>	Where an officer is attending a conference or event away from the office they are expected to discuss the trip with relevant colleagues. The General Manager will then confirm if there is sufficient funding for the Union to finance the conference or event. If it is not budgeted for it can be discussed with the Board of Trustees.
<b>Claiming expenses</b>	Under normal circumstances expenses should be incurred and then reclaimed on returning to the office. Expense claims will be processed as a part of the payment run which is processed on a Thursday and should follow the expense regulations as outlined in the Union Financial Procedures.
<b>Cash advances</b>	If you do not have sufficient cash to cover the cost of the trip you may ask for a cash advance. Advances will be given based on the daily rates specified in the expenses policy
<b>Train fares</b>	To get the best rate you should booked these using our Business Trainline account using the corporate credit card and where possible

the best value fares should be sought. This typically will include trains at fixed times and off-peak

## Scrutiny

Each Council meeting should receive a copy of the Sabbatical Officers' activity report following the guidelines of the Bye-Laws. The Board of Trustees will also receive an updated copy of Officer Objectives with progress at each Board Meeting.

Further reflection of how to effectively enable students to scrutinise officer performance will form part of the Democracy Review committed to in the Strategic Plan 2017-2020.

## Support

There is plenty of support within the organisation with the General Manager tasked with being your first line of support should you need it. Occasionally you may feel you require access to independent, confidential advice. We have agreed with the University HR team that we can have access to their arrangement with 'Health Assured.' This can be accessed online at <https://healthassuredeap.co.uk/> using 'Leeds Trinity' as both username and password. They can also be contacted by phone by calling 0800 716 017. You should quote 'Leeds Trinity University' when asking where you are calling from.