

Agreement between the University of Leeds and the recognised trades unions regarding funding for facilities

A. INTRODUCTION

This agreement between the University and the recognised trades unions sets out what the University will provide in time off and facilities for elected representatives and specifies how facilities funds, which are allocated for the purpose of workload remission, are managed. It is intended to help to avoid misunderstanding, to ensure fair and consistent treatment, provide for compliance with University financial procedures, and to facilitate better planning for union officers.

The agreement commences on 1st March 2014 and will be monitored annually to ensure that the provision of time off and facilities for elected officers is appropriate.

B. SCOPE OF THE AGREEMENT

This agreement covers those trades unions who are recognised by the University as having negotiation and consultation rights, i.e. UCU, Unison and Unite. Other trades unions may represent their individual members at internal hearings and appeals but will not have recognition rights.

C. THE UNIVERSITY'S UNDERTAKING

1. The University (i) recognises the importance of effective industrial relations to the well-being of the institution and (ii) has a legal duty under section 168 of the Trade Union and Labour Relations (Consolidation) Act 1992 and Health and Safety Regulations. It will therefore provide reasonable / necessary time off during working hours for elected representatives of the recognised trades unions to consult or represent its members (and, where appropriate, negotiate on their behalf) and undertake appropriate training in respect of matters set out in the Procedural Agreement between the University and UCU and the Support Staff Procedure Agreement between the University, Unison and Unite, including :
 - (a) terms and conditions of employment;
 - (b) representation of individual members;
 - (c) other service conditions including equality and inclusion, pensions and health and safety;
 - (d) any other matter that is, from time to time, agreed between the University and the recognised trades unions.

2. The University will also, as far as is reasonably practicable and proportionate, make available to elected union representatives the following facilities to enable them to carry out the industrial relations duties described in (1) above:
 - (a) *on an uncharged basis:*
 - reasonable office accommodation for use by union representatives;
 - accommodation for meetings in non-chargeable space where representatives (including Union Learning Representatives) can meet with union members;
 - reasonable use of notice boards, to be allocated in accordance with local working practices;

- access to e-mail, internet and intranet facilities;
- provision of computers and printers, subject to the University's replacement cycle
- access to members who work at different locations (with expenses being met from union funds, and using technology where possible for meeting those who work at great distance).

(b) *on a charged basis*

- reasonable printing and reproduction facilities;
- reasonable equipment costs;
- the use of internal and external telephone and mail services;
- accommodation for meetings held in chargeable space.

3. In furtherance of 1 and 2, the University will provide a facilities grant to each of the recognised trades unions, which will buy-out the time required by, and provide work activity remission for, the key union officers to undertake their union duties and will also cover non-staff costs, as indicated in 2 above¹.
4. Exceptionally, where any or all of the unions experience unusual peaks of union work which could not reasonably be carried out within the allocations already made and the time provided in the normal way by schools / services, consideration will be given to providing additional facilities funds. Typically, such payments will be agreed in advance, although there may be occasions where a retrospective payment is required, normally within the financial year. These payments will be subject to a clear written case being provided by the union concerned.
5. The University will adhere to section E below, which describes in detail the procedure for managing the facilities grants.

D. THE RECOGNISED TRADES UNIONS' UNDERTAKING

6. In accepting the facilities grant, the recognised trades unions agree to the following conditions:
 - (a) to use their grant only in furtherance of their University industrial relations duties as set out in (1) above;
 - (b) to adhere to the procedure for managing the facilities grants, as detailed in section E below;
 - (c) to adhere to the guidelines set out in the University's Financial Procedures in respect of courses and conferences, travel and subsistence, meeting refreshment and entertainment costs, and telephone expenses²;
 - (d) to adhere to any other policies, guidelines and codes of practice in respect of the use of the University's IT, printing and mail facilities;
 - (e) to meet quarterly with the Central Services Finance Manager to review their facilities grant accounts.

¹ An amount currently equivalent to 2 FTE, of which up to £5,000 may be used for non-staff expenditure

² See: www.leeds.ac.uk/finance/policies/expenses/index.htm

7. Where further authorisation is required in (c) above, trade union officers will seek the agreement of the Director of HR (or nominee), as they should for approval of any exceptional or other facilities and expenditure not explicitly referred to in this document.

E. PROCEDURE FOR MANAGING THE FACILITIES GRANTS

8. The unions' facilities grant accounts are part of the HR financial account structure. The Director of HR (or nominee) has responsibility for ensuring that the funds are allocated in line with the University's financial regulations. S/he will be advised by the Central Services Finance Manager who will liaise with the senior elected officers of the unions to agree transfers to schools / services and to monitor and provide reports on a quarterly basis. For UCU, the senior elected officers are the President and Honorary Secretary of the local association. For Unison and Unite, senior elected officers are the Branch Chairs and Branch Secretaries.
9. The facilities funds will be available from the start of the University financial year (i.e. 1st August each year) and, as the grant accounts are core University accounts, the funds can only be spent within that financial year, i.e. the rollover of funds will not be permitted.³
10. As soon as each trade union can provide information regarding the election of key union officers for a particular year, the Director of HR (or nominee) will confirm the position to the relevant heads of school / service, will provide them with a copy of this agreement, and will take the opportunity to explain in broad terms the University's commitment to providing reasonable time off for trade union duties and the legal framework, making reference to section 168. The University will encourage heads who have a union officer working in their area to agree a *modus operandi* with them at an early point.
11. Each union will determine, according to its rules, the percentage of time that key union officers will spend undertaking union duties and then the President / Branch Chair will discuss proposed compensatory allocations of facilities funds to schools / services with the Central Services Finance Manager before the start of the financial year or soon thereafter. The authority of the Director of HR (or nominee) to make the transfers to unrestricted School / Service accounts for work activity remission / backfill purposes will be sought by the Central Services Finance Manager.
12. Faculty / Service HR Managers will be responsible for resolving any problems that emerge in relation to key union officers receiving appropriate work activity remission to undertake their union duties, involving the appropriate dean or VCEG member if necessary.
13. Senior union officers will ensure that the purchase of any equipment, service, or any other non-staff cost, follows the University's purchasing rules and requirements. Equipment purchased using facilities funds will remain the property of the University. If a union officer stands down or is not elected to office in a subsequent year, any equipment allocated during his/her term of office will be returned to the union office and may be allocated to a newly elected officer. Each union will hold an inventory of equipment purchased using facilities funds. The authority of the Director of HR (or nominee) will be sought by the unions for the purchase of any miscellaneous or extraordinary equipment or services.

³ In very exceptional circumstances, where there is good reason, the Director of HR (or nominee) may agree to 'roll over' up to £5,000 of facilities funds in order not to put unnecessary pressure on last minute spending.

