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Finance and Strategy Officer
4th Quarter Report 2025
Submitted 17/11/2025 at 8am
1738 words

Part One: Executive Officer Position Description Duties

8.1. Assume all the powers and duties of the President in the absence of the President and the Administrative Vice-President.

N/A

8.2. Where reasonably required, assist the Administrative Vice-President in their duties.

I have helped Amy where possible this quarter, but this has been somewhat limited, partly due to me running in OUSA elections, which was the most substantial work that I would have been useful helping with. Other than this I have assisted where needed. Amy has been amazing to work with this year. OUSA has been lucky to have someone so dependable and down to earth in this role.

8.3. Be a member of appropriate internal committees of the Association, including, but not limited to:

8.3.1. Standing Committee of the Executive;

Yes, I've attended all standing committee meetings this quarter.

8.3.2. Finance, Expenditure and Strategy Committee;

Yes, I've chaired the two meetings this quarter.

8.3.3. Policy Committee and;

Yes, I've attended all Polcom meetings this quarter (I think we have only had one).

8.3.4. Grants Panel.

N/A, we haven't met this quarter.

8.4. Meet regularly with the Chief Executive Officer to ensure a governance oversight of the Association finances and capital projects.

Yes, I continue to meet with Debbie fortnightly to discuss all things OUSA.

8.5. Chair meetings of the Finance, Expenditure and Strategy Committee, ensuring that all committee members are advised of meeting times, that the agenda is prepared and circulated beforehand and that the standing orders of the committee are adhered to.

Yes, I chaired both meetings this quarter and have circulated agendas beforehand. We had long discussions at both meetings, something I imagine will continue into 2026.

8.6. In conjunction with the Chief Executive Officer, maintain oversight of the Association's holdings, with a focus upon sound investment of student funds and adherence to the Association's Strategic Plan.

Yes, Debbie and I are frequently discussing the use of our assets, and how we can make better use of them for students.

8.7. Maintain a sound understanding of the position of any of the Association's holdings, ensuring that all relevant documentation is filed as soon as is reasonable and accessible and that financial controls are understood.

Yes.

8.8. In conjunction with the Chief Executive Officer, ensure that the Association produces annual audited accounts and an Annual Report.

The annual report is being written by Liam before EOY. Auditors were reappointed at the AGM this quarter.

8.9. Ensure expenditure and budgeting is in line with the Association's Strategic Plan, and advise the Executive of any significant discrepancies.

Yes, continued as per the rest of the year.

8.9.1. Authorize transactions from the Association accounts relating to the Executive expenditure.

Yes, I sign off invoices related to the Executive.

8.10. Oversee the Executive budget setting process.

N/A, done in Q3.

8.11. Ensure that all Executive Officers are familiar with the Executive Budget, expenditure processes early in the year and assist them where necessary.

N/A, done in Q1. I continue to do reimbursement stuff for exec members.

8.12. Update the Executive monthly on the Executive Budget expenditure.

Yes, I continue to update the Exec on changes. As has been the case for all the year, our officer's budget is a large positive variance.

8.13. May be appointed a Director of any company where the Association holds the power to make such an appointment, including but not limited to:

8.13.1. University Union Limited.

Yes, I attended the Q4 meeting in November.

8.14. Assist and liaise with students and Students' Associations on University of Otago satellite campuses.

N/A

8.15. Oversee any campaigns undertaken by the Association, actively seeking to inform the student body and general public on student issues and concerns and liaising with relevant officers such as the Political Representative, including but not limited to:

8.15.1. Encourage voter participation;

N/A, I believe this is specifically relating to OUSA elections, which I was a candidate for.

8.15.2. Local Body Elections; and;

Yes, most of the promotion was done in Q3, but the local body election mag was this quarter due to it being late. I ranked the anonymous comments which were aggregated for between four exec members rankings. Having discussed it with a city councillor recently, it was noted that the magazine was far too late. This is something that will need to be considered in three years' time at the next local election.

8.15.3. National Body Elections.

N/A, not related to this year, but we had a meeting with Generation vote to discuss rolling out enrolment campaigns early next year and discussing how we can collaborate.

8.16. Support and act as a reference point for all Executive Officers in the running of campaigns and initiatives, ensuring they are executed in line with the Association's Strategic Plan and objectives, and that the student body are informed of these events.

There have been no campaigns this quarter aside from finishing off local body stuff.

8.17. Liaise regularly with the Chairs of all Association committees to ascertain the campaigns, initiatives and directives from those committees, and act on those directives where appropriate including but not limited to:

8.17.1. Residential Committee;

I don't believe the committee has met for at least a few months.

8.17.2. Affiliated Club Council; and;

N/A, Deborah discussed club policy stuff which was well supported, but she is well on top of this and is far more of an expert on policy than me.

8.17.3. Academic Committee.

The key campaign here continues to be lecture recordings, which is going to the university senate this month. I don't think any public campaign outside of meetings will have any effect on the chances of this policy's success. The University knows where students stand on this issue.

8.18. Be available via cell phone at all practical times.

Yes

8.19. Perform the general duties of all Executive Officers.

Yes

8.20. Where practical, work not less than twenty hours per week.

My Q4 average is 20.2 hours per week. My hours worked dropped over the OUSA election period, and I have worked hard to get my average back to where it needs to be.

Part Two: General Duties of All Executive Members

3. General Duties of all Executive Officers

3.1. The appointed term for all OUSA Executive Officers shall commence from the 1st of January and will terminate on the 31st of December of that same year.

Yes, I am heading home in the next few weeks but will be contactable by phone and email while I'm out of Dunedin and will be attending all meetings online while I'm away.

3.2. Where reasonable, all Executive Officers are expected to assist as volunteers for OUSA events and functions, including, but not limited to:

3.2.1. Assisting at the OUSA Tent City and other activities during Summer School, Orientation and Re-Orientation; and;

N/A

3.2.2. Assisting with elections and referenda where appropriate.

N/A, I was unable to help with the OUSA elections due to running as a candidate.

3.3. It is expected that Executive Officers attend Executive meetings.

Yes, I have attended all executive meetings this quarter (including standing committee).

3.4. Where reasonable, all Executive Officers are to be available for national conferences, national and local campaigns, Executive training sessions and Executive planning sessions.

N/A, nothing this quarter.

3.5. All Executive officers shall:

3.5.1. Keep up to date with the Finance and Strategy Officer's Executive budget, bringing to the Finance and Strategy Officer any spending proposals, keeping track of their spending and ensuring they do not exceed budgeted expenditure;

There has not been much campaign spending this year. We have tripled this budget for 2026 to give more emphasis to exec campaigns.

3.5.2. Educate themselves on needs and experiences relevant to historically marginalised demographic groups including intersectionality and promote and encourage all demographics to participate, where relevant, in clubs, societies, committees and OUSA events;

Yes

3.5.3. Act in accordance with and uphold Te Tiriti o Waitangi while exercising their duties;

Yes

3.5.4. Where reasonable, attend events hosted by clubs related to historically marginalised demographic groups;

Yes, I attended many AGMs this quarter for equity groups to get an understanding of what has been going on in their respective associations/clubs.

3.5.5. Prioritise sustainability and minimization of environmental impacts in all aspects of their role and keep up to date with environmental issues;

Yes

3.5.6. Every quarter undertake five hours of voluntary service which contributes to the local community; and;

I only did half of my community service hours this quarter, partly due to getting bogged down through the exam period.

3.5.7. Regularly check and respond to all communications.

Yes

Part Three: Attendance and involvement in OUSA and University Committees

University Union Limited Company - Director

Finance Expenditure and Strategy Committee - Chair

Policy Committee

Political Action Committee – Chair

Part Four: Goals and your Progress

Cost of living: The utilities discount proposal still sits with an OUSA department. No progress on this unfortunately.

Student bar: Nothing has come out from the University committee reviewing that the bar discussion sits at. When/if recommendations come from this committee, I will be sure to make the student voice loud on the issue next year.

Local Body election promotion: Completed, a significant amount of this work was done by the Debating Society who I want to acknowledge. There is room for improvement in the future, some of which relate to the 2026 general election.

Part Five: General

Q4 has definitely been a fast quarter. The two main things that I have been a part of were the finishing up of Local Body election promotion and kicking off the financial sustainability review. This review is a key piece of work to finish the year that will lead to discussions about the structures and processes at OUSA, identifying if we are fit for purpose and where improvements need to be made.

Looking back on the year that's been, it sure has been one hell of a year. I want to thank all the people that have made the journey easier. Both exec and staff, the best part of the job is the people you get to work with, even if we've had our differences. I'm glad to have made it through and to have worked with some incredibly passionate people at OUSA and in the wider University community. It's been a massive year, but the journey isn't finished yet. See you back in 2026.