



Branch Secretaries Starter Pack

BRANCH SECRETARIES - STARTER PACK

The aim of this guide is signpost you quickly to the information you need to lead your branch, answer queries, and deal with branch administration. Follow the index below to find out more about:

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UNISON Rule Book

UNISON's rules govern the way the union runs, how branches work and outlines the responsibilities of its members and staff. <http://www.unison.org.uk/acrobat/20163.pdf>

Running the Branch:

The Code of Good Branch Practice <http://www.unison.org.uk/acrobat/19127.pdf> gives guidance and advice on the many practical, constitutional, organisational and procedural issues that confront branches.

Your Branch Rules will set out the criteria for calling meetings, for branch representation, the quorum for general meetings and composition of the branch committee, etc. **Core branch rules** form part of the Code of Good Branch Practice. These can be downloaded from <http://www.unison.org.uk/activists/branchresources.asp> for branches to insert local information as needed.

Organising your Branch Annual General Meeting

- This must take place between 1 January and 31 March each year.
- *Organising your Branch AGM* www.unison.org.uk/acrobat/14486.pdf will be particularly useful for new branch officers who have not organised an AGM before. It includes a suggested election procedure and timetable, guidance to help you improve attendance at meetings and samples of paperwork you can adapt for use in your branch.
- Early each year your region will send you the **National AGM Branch Officer Update Form** to notify them of the results of AGM elections for branch officers. The deadline for returning this is **11 April each year**.
For branch officer vacancies filled during the year or for resignations, notify your RMS section as soon as these occur.
- If you would like any further advice on organising your AGM contact your regional officer.

New branch reps: Notifying region and employers of and branch officers

Where branches update RMS themselves, they should update members' records on RMS to note the representative roles they have taken on and they should also notify the employer of this.

Branches who do not update RMS themselves, should complete the 'purple form' www.unison.org.uk/acrobat/11392.pdf to notify their region of new representatives. Regions will then notify the employer on behalf of the branch.

Representing members and using CASE forms

UNISON's Representation Guide, the CASE form and model letters can all be downloaded from http://www.unison.org.uk/activists/sh4_problems.asp. The Representation Guide gives clear advice on working with members on representation issues.

Making your Annual Branch Finance Returns

The Branch financial year runs from 1 January – 31 December. By 15 March each year branches must submit their Annual Branch Finance Returns for the previous year to avoid penalties and losing the right to send a delegate to National Delegate Conference.

In January each year branches will receive by email the paperwork for completing the previous year's return. To resolve any issues with this or for non-receipt of this information, phone the Finance RMA Team on 0800 917 3047.

Paying Expenses and Honorariums

The rules applying to all **honoraria payments to branch officers** are set out at <http://www.unison.org.uk/Acrobat/18785.pdf> and questions and answers explaining them at <http://www.unison.org.uk/Acrobat/18784.pdf>

Rates of **expenses for members attending meetings** or carrying out other activities on behalf of the branch should be agreed by the AGM in accordance with the Scheme for Branch Expenses contained in the Branch Finances Handbook <http://www.unison.org.uk/Acrobat/e6358handbook.pdf>

Updating Members' details on the Membership Records System

Branches who are live on RMS, can do this themselves. Those who are not can submit membership details updates using <https://www.unison.org.uk/help/index.asp> or can point members to this link so they can do it themselves.

Line Counts

A 'Line Count' is a count of the branch membership each autumn by counting the number who pay subscriptions to each branch. This figure is used to calculate the number of delegates branches can send to National Delegate Conference (NDC) and is used on the branch's Annual Financial Return. It is produced by counting the number of full members who pay subscriptions by direct debit, by cheque and by DOCAS (Deduction of contributions at source) from their wages.

Most employers provide DOCAS reports directly to UNISON's IMPS Membership section, but where they do not, your region may ask you to obtain this information from the payroll provider for each employer in your branch. The deadline for providing this to regional RMS departments is 30 November each year. If you have a query about a line count request made to you by your region, contact your regional RMS team.

Completing Joint Branch and Region Assessments

This annual assessment, carried out jointly between the branch secretary and the regional organiser, is about building stronger branches and getting the necessary support to make those changes happen. The best time to complete this is **January-February** though branches can start in December if all the information they need is available. The *Framework for Joint Branch and Region Assessments – a Branch Guide*

<http://www.unison.org.uk/acrobat/17562.pdf> explains the process.

The **Branch Development and Organising Toolkit** www.unison.org.uk/activists/branchdevelop.asp is a set of short planning modules that can help branches map their branch organisation and membership. It will also assist them in developing their branches and recruiting and organising new members and activists.

Training for Reps and Members

U-Train <https://www.unison.org.uk/utrain/> gives details of the training and development courses for union reps that UNISON offers, as well as personal and career development courses ranging from Skills for Life through to professional qualifications.

Your regional education officer <http://www.unison.org.uk/laos/moreinfo.asp> can provide details of your region's training programme. This may also be available on your region's website <http://www.unison.org.uk/about/regions.asp> together with application forms

The *Guide to Developing and Supporting Workplace Reps*

<http://www.unison.org.uk/acrobat/19013.pdf> offers advice on buddying and mentoring to support reps to get active in their workplaces, and the *Trained and Active Plan (TAP) form*

http://www.unison.org.uk/acrobat/Trained&Active_forms.pdf provides a questionnaire to work through with reps to record training needs and progress towards them.

UNISON Conference Timetable including NDC, National Service Groups and National Self-Organised Groups

The Conference timetable <http://www.unison.org.uk/conference/index.asp> gives details of forthcoming conferences, as well as useful downloads including forms, annual reports and rulebooks.

National Delegate Conference: Submitting Motions/ Rule Amendments and sending delegates to NDC

UNISON National Delegate Conference is held in June each year. Visit <http://www.unison.org.uk/conference/ndc.asp> for the Conference timetable and to download the Conference Bulletin which explains how to submit motions and applications for delegates to attend NDC using the online conference system – NB all applications must be made online. The Conference Bulletin also explains the Scheme of Branch Representation.

The deadline for submission of motions varies with the date of NDC each year and is usually in late February/early March. The deadline for online registration of conference delegates is usually end March/early April. Check the Conference timetable for the exact date.

Nominating Branch Representatives to Regional Council

Each year, in November, your region will email or write to all branches with paperwork requesting nominations to Regional Council. This message will explain the Scheme of Branch Representation and give the closing date for response in January. To resolve any issues with this or for non-receipt of this information, contact your Regional Management Team administrator.

UNISON's Fighting Fund to support campaigning and organising

The fighting fund is there to help you to support our members when they need it and to run campaigns against cuts and job losses at local level. It has two elements:

- The General Political Fund – for support and campaigning activity
- The General Fighting Fund – for support and organising activity

Both of these are available to support branches and regions in meeting the current challenges. Visit <http://www.unison.org.uk/acrobat/e6755.pdf> for more information.

Making a Regional Pool Bid

The Regional Pool can assist branches with funding for a development programme based on organising and recruitment activities. Branches applying for additional funding from the regional pool must do so as part of the branch development process. Visit http://www.unison.org.uk/activists/pages_view.asp?did=1966 for more information.

Complying with Data Protection Legislation

This guidance <http://www.unison.org.uk/acrobat/B3014.pdf> explains how the Data Protection Act (DPA) affects UNISON branches and the conditions attached to using and storing the information about members, non-members and potential members. It also

explains what branches should do if they receive a letter or email request from an individual who wants a copy of information held on them or a Freedom of Information Request?

Ordering from the online catalogue

You can order recruitment forms, publications and other materials using UNISON's online catalogue. For a tutorial and access to the catalogue visit

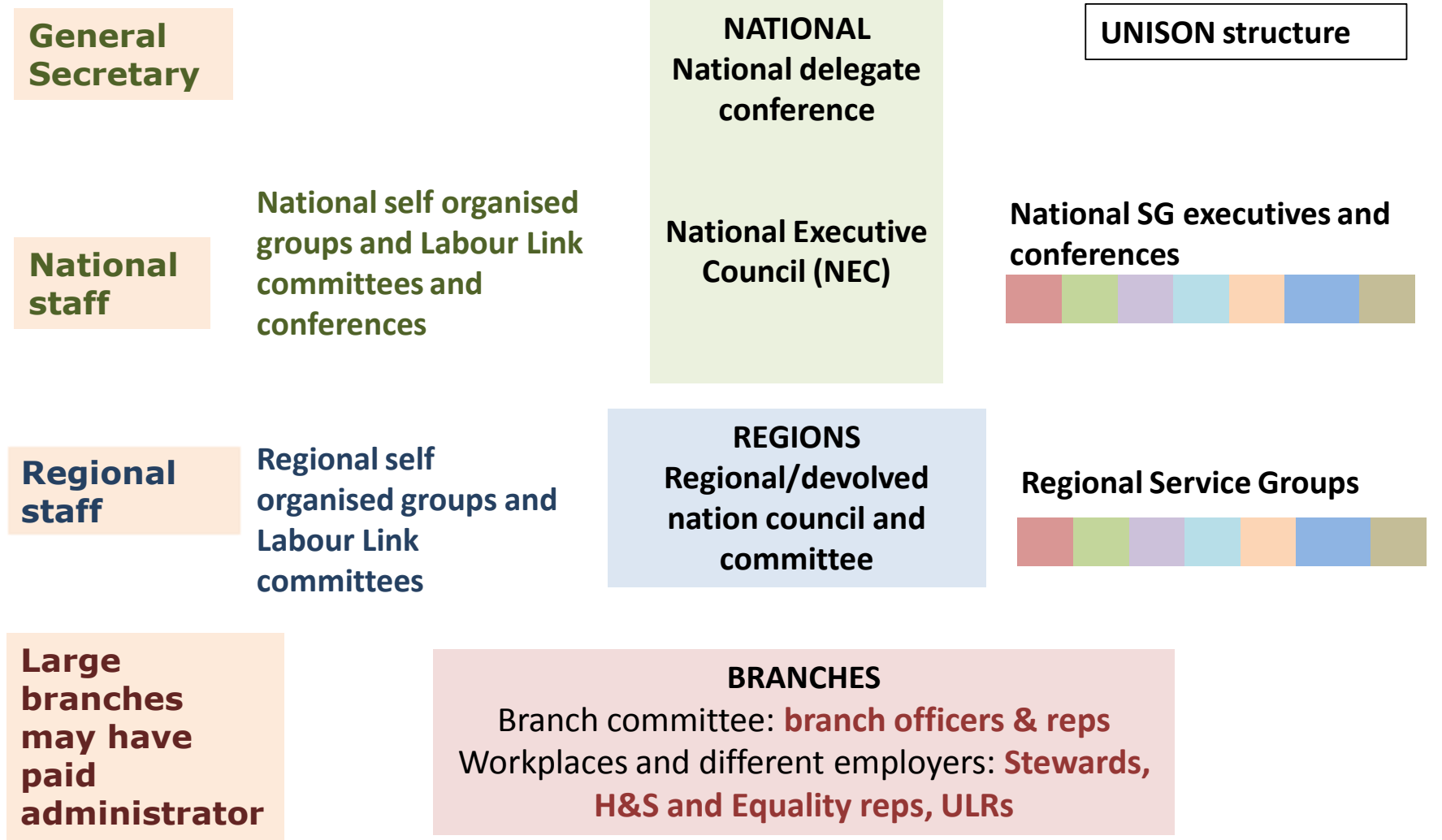
<http://www.unison.org.uk/resources/onlinecatalogue.asp>

Important Dates for Branch Secretaries

1 Jan - 31 Mar	Branch AGM's must be held in this period
Jan – Feb	Joint Branch and Region Assessments should be carried out
End Feb/early Mar	Deadline for submitting motions to NDC – check the Conference timetable for specific date http://www.unison.org.uk/conference/ndc.asp
15 Mar	Branches must submit their Annual Branch Finance Return for the previous year to avoid penalties and losing the right to send a delegate to NDC
End Mar/early Apr	Deadline for online registration of delegates for NDC – check Conference timetable for specific date http://www.unison.org.uk/conference/ndc.asp
11 April	Deadline for returning Branch Officer Update Form to Region following the Branch AGM
January	Branches must submit their nominations for Regional Council to their region.

Understanding UNISON's structure and the relationship between branches, regions and national level

The diagrams on the following pages explain UNISON's structure and how it all fits together.



1.3 million UNISON **MEMBERS** Working across public services in 7 service groups

Local Government	Health	Higher Education	Police & Justice	Community	Energy	Water, Environment & Transport
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General Secretary

National self organised groups and Labour Link committees and conferences

Regional self organised groups and Labour Link committees

NATIONAL
National delegate conference

National Executive Council (NEC)

REGIONAL council
Regions send delegates and motions to national conferences

BRANCHES
Send delegates and motions to Regional council and relevant regional/national conferences

How does it work

National service group executives
National service group conferences



Regional service groups



MEMBERS elect NEC, General Secretary and national service group executive members



General Secretary

NATIONAL
National delegate conference

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