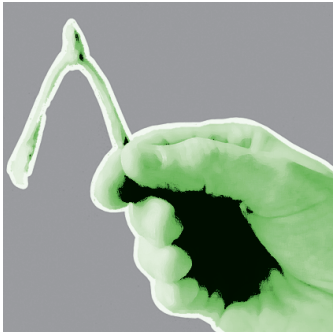


Framework for joint branch and region assessments



A guide to the 2012 assessments

Strengthening branches and defending jobs

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A word on branch structures

When UNISON was created in 1993 it was based on “lead-employer” branches. The 2007 conference noted that while in some cases this has continued to work well, the rapid growth of privatisation and transfer of work and jobs to the private and voluntary sectors has brought new challenges about how a branch organises and engages members across a range of new employers; where every member has equal rights and opportunities to participate in their union.

A branch committee where all its officers come from the same employer, and where its business is then dominated by that one employer, is not representative if the branch has members with other employers. The Code of Good Branch Practice advocates that most branches should adopt a sectional structure and explains how it would work. Adopting the Core Branch Rules in the Code will help the branch address this issue.

In some cases, following the assessment, the question might be asked, is this the right branch structure for UNISON to best organise new or reorganised employers? The National Executive Council has published a Scheme for the Establishment and Restructuring of Branches that will help branches and regions make changes to the structure of branches where necessary, to ensure we have sustainable branches capable for organising members even at times of employer restructuring, and where every member can be involved, irrespective of employer.

This guide is to help you prepare for the 2012 branch assessment. It outlines how you should approach the assessment and the issues to cover.

The aims of the assessment are to:

- identify the branch’s development priorities
- prioritise a few key objectives and actions
- plan how to achieve them
- align regional support to where it is needed
- to ensure we have a branch structure that is capable of supporting and mobilising all members, irrespective of employer, to defend jobs and services, through change.

The branch assessment should take place each year and arises from a decision of the 2007 National Delegate Conference that emphasised the importance of ensuring we have and maintain strong and effective branch structures. The assessment is not a ‘test’ and there are no ‘league tables’; it represents a partnership approach to building stronger branches where regional organisers are charged with supporting lay officers to build branch organisation and to make change where it is needed.

There are FIVE stages to ensuring Joint Branch Assessment is meaningful and effective in moving the branch forward.

1 Preparation – this is an evidence based assessment. Before you can assess what how effective is the branch, you need to collate the evidence – so you can make an informed assessment not just guesses. A brief discussion between the branch secretary and regional organiser when planning to hold the assessment will allow each to agree what evidence needs to be collated, and who collects what. A crucial step will be to identify members by employer, the real or potential sections within the branch, so that you can look accurately at performance and participation within each employer.

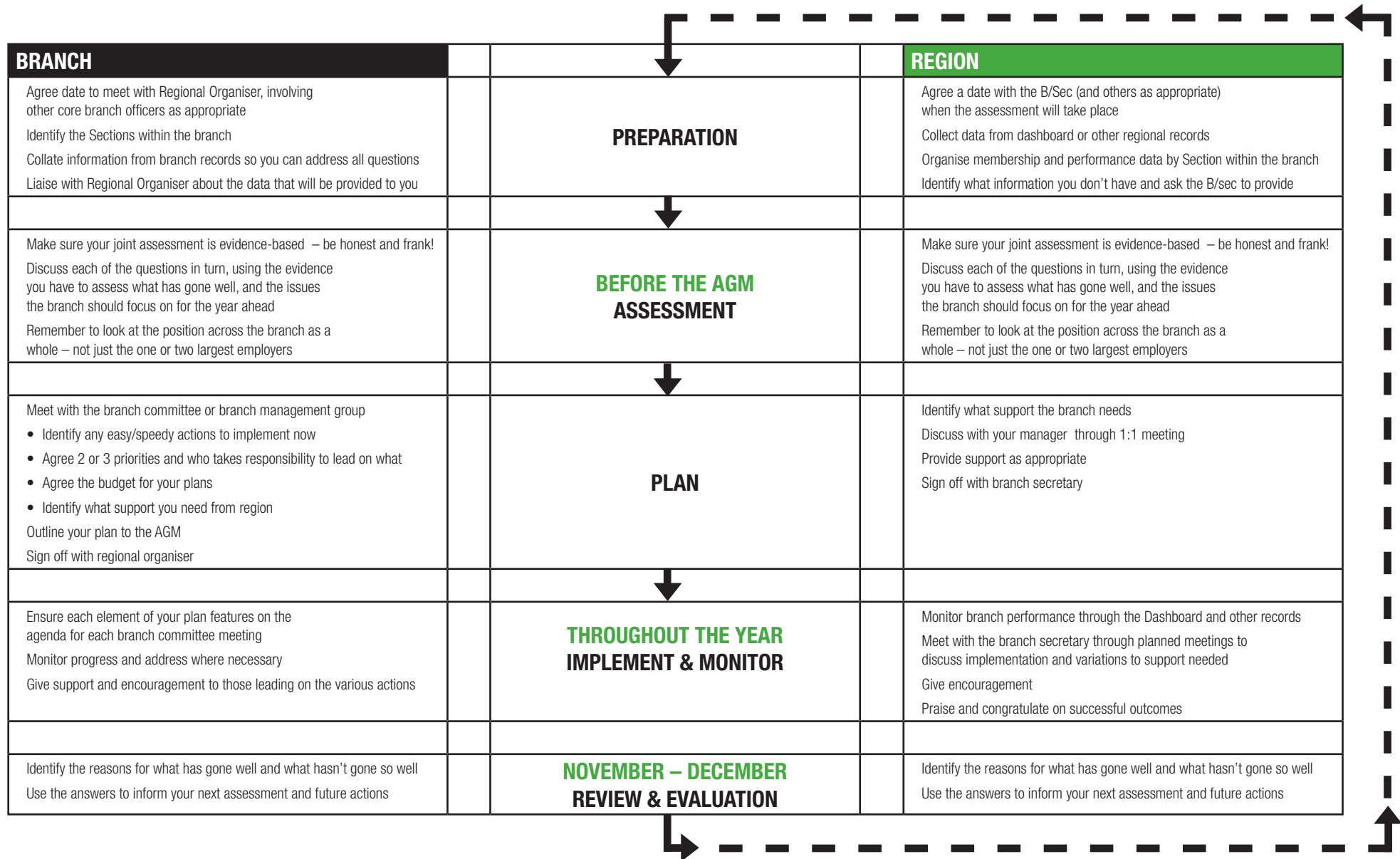
2 The assessment – there are different techniques to making the assessment. It might first involve the branch secretary and regional organiser together, or it could involve the core branch officers and the regional organiser. Either way, this needs to be as objective as possible, with conclusions based on the evidence and without excuse, criticism or blame – you can't identify improvements needed unless you are frank about any weaknesses. And remember, you are looking across the whole of the branch's membership, not just the main employer. The assessment form invites you to look at key areas of activity, and gives prompts to the kind of things you could and should be doing. You may have additional ideas of things that could be done – good, what matters is what works.

3 Plan – the assessment will flag up some things that need to be done - there will always be things to do and things made better, even in the best organised branch. Some things you'll deal with straight away; while others will be things that require planning and organisation, involve not just the branch secretary but the whole branch committee, that might need resources and a budget, and help from the region. There may even be a need for training before you can start implementation. Discuss these issues with your branch committee or management group; keep it manageable and select not more than 2 or 3 big issues to tackle this year; agree who will take responsibility for each area of work and the resources the branch will put into it. This is a plan that you should take to your AGM so the whole membership is united around addressing these priority building issues.

4 Implementation – led by the responsible branch officer, overseen by the branch secretary, monitored with the regional organiser, and progress reported at branch committee meetings. Unless implementation remains on the branch committee agenda, and unless those charged with leading on each action are given support and encouragement, it won't happen. Regular reporting will also enable you and the branch committee to respond if there are changes in circumstances, if progress is slow or there are unforeseen difficulties.

5 Review and evaluation – towards the end of the year, review how your plan has gone. It may be that some issues require a longer timescale and will continue into the next year, but check things are proceeding as planned and if your efforts are having the desired effect. And don't forget to praise and congratulate those who have made things happen, even if you didn't achieve the full outcome you'd planned for.

Branch planning process



Branch assessment: **part one**

Measure	Things to consider	Assessment	Possible actions
<p>Local bargaining and campaigns</p> <p>1.1 How well organised is the branch to meet the challenge of ongoing and new threats from each of the employers the branch covers?</p>	<p>Do we meet key decision makers in each employer?</p> <p>What are the Employers' plans?</p> <p>How can we improve the effectiveness of our lobbying employers?</p> <p>Are we getting our voice across to members and heard in the media?</p> <p>Our involvement in CLP and trades council</p>		
<p>1.2 Is the branch able to organise and support members irrespective of employer?</p>	<p>Have we a lead steward in every employer?</p> <p>Is information fed back to the branch committee and used to inform its planning?</p> <p>Has the branch a regular newsletter to get the branch message across, and does it cover all employers</p> <p>How do members raise their issues with the branch?</p> <p>How are resources devolved to sections to support employer level activity?</p>		
<p>1.3 Is the branch promoting equality?</p>	<p>Do we talk to every employer to ensure they are implementing their equality policies?</p>		

Measure	Things to consider	Assessment	Possible actions
<p>Recruitment and organisation</p> <p>2.1 How effective is the branch in recruiting and organising?</p>	<p>Look at every employer the branch deals with, not just the lead employer.</p> <p>Is there an accurate branch map?</p> <p>Where can density levels be improved?</p> <p>Recruitment practices:</p> <ul style="list-style-type: none"> • Approaching new starters • Attending inductions • Following up non-joiners • Recruitment events • How easy is it to join? <p>Is recruitment from across all grades, hours, etc, or are there disparities to address?</p> <p>How do stewards know their members?</p> <p>Is recruitment planned, driven and monitored – how?</p>		
<p>2.2 Has the branch an effective activist network?</p>	<p>Numbers in each employer and section</p> <p>Ratio of activists to members</p> <p>How do members know their steward?</p> <p>Annual elections</p> <p>Steward training</p> <p>Mentoring and buddying new stewards</p> <p>Support given to stewards</p> <p>How “active” are the activists – why are some not active and what can be done to encourage more activity?</p>		

Measure	Things to consider	Assessment	Possible actions
<p>Representing members</p> <p>3.1 How effective is the branch in handling casework?</p>	<p>Proportion of stewards trained</p> <p>How many stewards actually represent?</p> <p>Use of casepapers for all cases</p> <p>How does the branch monitor quality of representation?</p> <p>Use of mentoring to support casework at workplace level</p> <p>Central record of cases completed</p> <p>Complaints received at region</p>		
<p>Participation</p> <p>4.1 How democratic is the branch?</p>	<p>Quorate AGM</p> <p>Regular general meetings</p> <p>Attendance from across all employers</p> <p>Is there a sectional structure?</p> <p>Membership profile cf employment profile</p> <p>Efforts to reach all members</p> <p>Functioning SOGs groups and activity for young members and retired members</p> <p>What steps are made to encourage the participation of low paid women members?</p> <p>Is the profile of activists the same as the membership by gender and race?</p>		

Measure	Things to consider	Assessment	Possible actions
4.2 Participation in UNISON structures	Are full delegations sent to NDC, SG conferences, SOG conferences, Regional Council and committees? Efforts to attract new delegates		
Use of branch resources 5.1 Budgeting and expenditure	Budgeting for the Plan Is financial support provided across all sections of membership, incl retired members and SOGs? Devolution of budgets to organised sections		
5.2 Branch rules	Compliant with Core Branch rules? Approved by Region? Structure relevant to range of employers organised Honoraria reasonable and compliant with scheme All donations approved by general meeting and complaint with rule Are structural changes needed to respond to changes in membership and distribution of employers?		
5.3 Branch staff	Use of XperTHR scheme Redundancy provision in accounts? Someone identified as manager of staff Regular staff appraisals		

Branch assessment: **part two**

When the assessment has been completed there may be actions on some things you can take straight away. Enter here not more than 3 bigger actions that might take longer to implement, that require planning, resources and leadership, and which may require support from the region.

Priority actions	Lead branch officer	Target for year	Branch resources	Regional support requested
1				
2				
3				

This joint assessment has been completed and approved by the branch committee. Any points of difference are recorded below:

BRANCH NAME

DATE __ / __ / __

SIGNED: Branch secretary

SIGNED: Regional Organiser

