



## NORTH WALES HEALTH BRANCH

*Get Involved!*

### Branch Officer & Stewards Roles

2011



#### Branch roles

As a UNISON member you're always part of your local UNISON branch. It's your main source of advice and support and the most important link between the union and members like yourself.

#### Workplace contacts

This is an ideal role for someone who is interested in becoming a steward or safety rep and wants to find out more about what's involved.

#### Stewards

A UNISON steward is an elected rep who helps organise, recruit and represent members in their workplace.

#### Health and Safety reps

A UNISON health and safety rep helps to make sure that people's jobs and their workplaces do not cause injury or ill-health.

#### Voting

UNISON members elect their representatives at all levels of the union. It's essential that young members vote in these elections to make sure their voice is heard. Young members also have a seat on the NEC from 2005.

#### ***Want to meet new people, learn new skills and go places?***

Be active in UNISON and you'll get a lot more out of your union. Getting involved means:

- Helping make a difference
- Getting together with work friends and colleagues and meeting new people
- Doing things you usually couldn't or wouldn't do alone
- New opportunities for education, training and personal development
- Helping yourself and improving your life at work, home and the wider world
- Having fun and doing something you enjoy

### Different ways to get involved

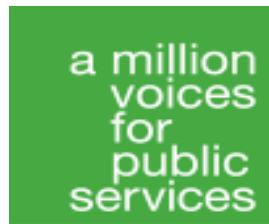
Different people participate in different ways. Try getting involved in:

- A local, national or international campaign
- The work of the UNISON job group connected with your employment

### Having an equal say

Different groups of members meet together under the UNISON umbrella. These groups:

- Ensure the union reflects particular experiences
- Enable members with common interests to come together on an equal basis to work on key issues affecting them.

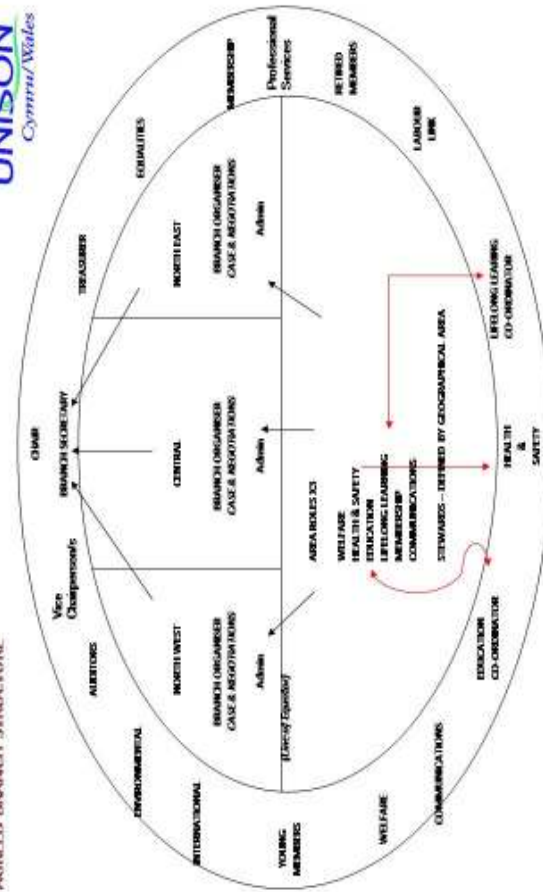


UNISON campaigning  
for a fairer society

[unison.org.uk/million](http://unison.org.uk/million)



AGREED BRANCH STRUCTURE



## **FUNCTIONS OF BRANCH OFFICERS**

A number of functions are defined within the rule book as the responsibility of specific branch officers. However these tend to be general statements covering overall responsibility for the proper running of the branch, each of which entails a large number of tasks.

In order that branches may make best use of the rule enabling branch officer posts to be shared, responsibilities of the core branch officer posts are detailed below. 'Responsibility for a task' does not necessarily mean 'doing the task'. All branch officer posts can be split into a number of tasks and functions that can be shared by more than one person.

It is important that branch committees evaluate the time demands on each post and seek to negotiate adequate facility time with the employer to allow the bulk of trades union duties to be carried out in paid time and at no loss to the officer.

Branch committees may also wish to distinguish between those tasks and responsibilities that must be underpinned by elective authority, and those which do not and which could be delegated to branch employed staff or volunteers.

Most of the members who have become active within UNISON started by doing a little or as much as they felt comfortable with.

Branches should seek out and encourage members who are prepared to contribute to UNISON in any way at all. Some will go on to become stewards, health and safety representatives or branch officers, but everyone that helps makes a significant contribution to developing UNISON as a dynamic, vibrant trade union.

Note: for some posts (eg retired members secretary, young members' officer, auditor) there are specific requirements or restrictions that determine who can stand for office in these posts.

## **CHAIRPERSON**

Tasks relating to the office of branch chairperson

- to preside at all meetings of the branch and branch committee in accordance with the guidance given
- to agree the agenda for meetings with the secretary
- to ensure that business is properly conducted
- to advise the branch officers and branch committee in respect of matters relating to procedure and interpretation of rules
- to ensure that all functions of the branch are carried out
- To work closely with the secretary to provide leadership to the branch.

### **VICE CHAIR**

The role of the Vice Chair is to support the Chair and act in the chair's absence.

### **SECRETARY**

The branch secretary is responsible for ensuring

- the proper completion of the following tasks. It is not expected that, especially in larger branches, the branch secretary will personally undertake all these functions but will act as the strategic lead officer and co-ordinator within the branch.

The secretary will encourage partnership working within the branch committee and the development of new representatives, will be the manager of branch staff and will manage the delegation of work to other branch officers and branch staff as appropriate, whilst providing support and guidance.

Tasks relating to the office of branch secretary:

- to guide the branch's development through the preparation and implementation of a branch organisation and development plan
- to supervise the work of the branch organisers
- to provide support to the branch organisers through regular one to one meetings
- to ensure the representation of members within the branch in accordance with national guidance and that case forms and applications for services forwarded to UNISON offices are properly completed and authorised
- to convene and attend all meetings of the branch and branch committees.
- to arrange for the minutes of meetings to be kept in a proper manner and circulated to all branch officers and stewards
- to arrange for branch records to be kept in a proper manner
- to ensure the branch, speedily and accurately, processes applications for membership and maintains records in accordance with UNISON's systems
- to ensure regular communication with the members of the branch with news of campaigns, negotiations, issues, branch developments and activities
- to communicate with the union's regional and head offices on behalf of the branch
- to ensure that branch members are aware of opportunities to participate in the activities of the wider union, or within self-organisation if appropriate
- to support, mentor and encourage the stewards in the branch on an individual and collective basis. The branch secretary should seek to meet with each steward on a one to- one basis, to discuss issues and workplace organisation, on a six-monthly basis

- to ensure that members and stewards are aware, and take advantage, of educational and training opportunities within UNISON
- to ensure that appropriate publicity activities are developed and co-ordinated by the branch
- to act as spokesperson for the branch when in contact with other levels of the union and external organisations
- to ensure that members receive the benefits, rights and services to which they are entitled
- to co-ordinate all branch negotiations and industrial relations matters
- to ensure, in conjunction with the branch committee, that the branch observes the union's rules, supports UNISON campaigns and works towards achieving UNISON's objectives
- to ensure the proper management and direction of any branch employed staff

#### **AREA BRANCH ORGANISER**

Tasks relating to the office of Area Branch Organiser

- Be responsible for organising within the defined areas, the aims and objectives of the union including, recruitment and retention of members.
- To be responsible for organising all meetings within the defined area branch of stewards and members.
- To manage day to day work allocation and be responsible for supervising branch employed staff where necessary.
- To encourage all stewards to participate in the unions objectives and campaigns.

- To ensure the representation of members within the area defined in accordance with national guidance.
- To provide appropriate support and supervision for stewards undertaking case work. Encourage and mentor stewards on an individual and collective basis.
- To ensure correct records are set up and maintained, in particular the use of CASE forms.
- To communicate with all stewards and branch officers within the defined area on a regular basis.
- To lead on campaigns as agreed within the defined area and recommended by the branch or UNISON.
- The Area Branch Organiser should seek to meet each steward on a one to one basis, to discuss issues and workplace organisation on a 6 monthly basis.
- To lead on day to day negotiations with the employers within the defined area and encouraging stewards to deal with issues at a local level.
- To liaise with the secretary and Area Education coordinator to identify and promote training for stewards and representatives.
- To be part of the negotiation team of the branch committee in all dealings with the health board.
- To ensure correct minutes are taken and circulated to all stewards within the defined area.
- To act as spokesperson and deputise for the branch secretary in their absence as agreed at the branch meeting.

- To work as part of a team with the branch committee and observe branch rules and attend branch committee meetings.
- To ensure that the branch organisers liaise with the chair and secretary on issues that may have a wider impact on the branch to avoid potential conflict between areas.

(The branch secretary to make final determinations on any disputed areas after consultation with the branch chair person)

### **TREASURER**

Tasks relating to the office of branch treasurer

- to conduct the branch's financial business
- to keep accounts in accordance with the rules
- To prepare budgets for each of the three defined areas for activities such as welfare, recruitment, campaigning etc.
- to provide reports on the financial position of the branch to the branch committee or branch executive committee
- to provide a detailed financial report for the annual branch meeting(s)
- to advise the branch officers and branch committee in respect of matters relating to financial management and appropriate expenditure
- to provide an audited annual return of branch income.

### **EDUCATION CO-ORDINATOR**

Tasks relating to the post of branch education co-ordinator:

- to make sure all new stewards and safety representatives receive initial information and guidance about their duties, e.g. stewards handbook, rulebook, service conditions agreements, etc
- to publicise the range of educational and training opportunities available to members and activists
- to get untrained stewards, safety representatives and other branch officers onto appropriate training courses
- to co-ordinate and support the work of learning representatives
- to encourage branch members and activists to make use of the UNISON Open College courses, especially 'Return to Learn' and 'Women, Work and Society'
- to maintain contact with the regional education officer/regional education committee
- to establish a plan of training for activists and to produce an annual budget to meet its costs
- to keep records of what training has been undertaken and by whom within the branch
- to make sure that activists get paid time off for training where appropriate.

### **LIFELONG LEARNING CO-ORDINATOR**

A branch with a number of learning representatives working as a team, led by a co-ordinator, can ensure that learning representatives are accountable and involved in the branch; that learning is high on the branch's agenda and linked into its organising, bargaining and equalities work; and can provide a clear progression route for learning representatives who want to become more involved in other aspects of branch activity.

Tasks relating to the post of branch lifelong learning co-ordinator:

- to work closely with the branch education Co-ordinator (the same person may take on both roles)
- to co-ordinate the activity of learning representatives in the branch education team
- to work with colleagues to recruit new learning representatives
- to be closely involved in negotiating around learning with the employer
- to co-ordinate and disseminate information on learning opportunities in the branch
- to ensure that the work of learning representatives is fully integrated into the branch.

### **EQUALITY OFFICER**

The branch equality officer has a number of important functions. It is not expected that the office holder will be the font of all knowledge on every equality issue, nor carry sole responsibility for the branch's equality work.

Everyone shares responsibility for tackling prejudice and discrimination and promoting equality. The role of the branch equality officer is to co-ordinate and monitor this shared responsibility.

Tasks relating to the office of equality officer:

- to be the identified and well publicised point of contact in the branch for equality issue.
- to collect and share information on equalities issues, including information from the regional and national self-organised groups
- to make sure other branch officers and the branch committee consider the equalities dimension of everything they do
- to make sure "equal opportunities" is being raised in all collective bargaining – not just in bargaining on 'pure' equalities issues
- to encourage and support the development of branch self-organised groups on behalf of the branch committee
- to have a co-ordinating role among the self-organised groups, and between the self organised groups and the rest of the branch
- to make sure new recruits know about UNISON's commitment to equality and opportunities to participate in self-organisation
- to advise the branch officers and branch committee on the development and monitoring of the action plan to achieve proportionality and fair representation
- to co-ordinate the development and training of members from under-represented groups.
- to coordinate motions and support to delegates attending self-organised group conferences.

#### **HEALTH AND SAFETY OFFICER**

Tasks relating to the post of health and safety officer:

- to increase the awareness of members, health and safety representatives and branch officers of health and safety issues
- to organise the information held by the branch on health and safety
- to co-ordinate the activity of health and safety representatives and to organise regular
- meetings of health & safety representatives to exchange information and consider priorities
- to be closely involved in all negotiations with the employer on matters related to health and safety
- to advise the branch committee on health and safety issues arising in the branch and to recommend policies and priorities
- to act as a link between the health and safety representatives and other branch representatives to ensure that health and safety issues are treated as an integral part of the work of the branch
- to maintain contact with the region and regional service groups, for example via the regional health and safety committee.

#### **COMMUNICATIONS OFFICER**

Tasks relating to the post of branch communications officer:

- to explain UNISON's policies and to provide the information members need to play an active role in their union
- to assist with efforts to recruit new members

- to help support UNISON's national and regional campaigns
- to help create a positive image for the branch among members, potential members and the public
- to produce news-sheets or bulletins for distribution to branch members.
- to lead on the development of electronic communication with members – email, web, etc
- to ensure branch communications are in the accessible formats members need – audit for any particular requirements such as large print/ Braille etc
- to ensure that nationally and regionally produced publicity and campaign materials are distributed, as appropriate, to stewards and onward to members and non-members
- to monitor local media for stories which affect the branch and take appropriate action
- to help ensure that the branch makes effective contact with the media whenever necessary by:
  - creating and maintaining mailing lists to media outlets and contacts
  - writing press releases
  - ensuring that appropriate individuals within the branch are available for comments, interviews, etc
  - writing 'letters to the editor'.

#### **MEMBERSHIP OFFICER**

Tasks relating to the post of membership officer:

- to map the branch's membership in order to identify membership density and steward coverage
- to monitor the branch's recruitment, and also leavers rate
- to work with the branch committee to develop and implement its organisation and development plan
- to make recommendations to the branch committee on recruitment activities, targets, resources, budgets, etc.

#### **INTERNATIONAL OFFICER**

Tasks relating to the post of international officer:

- to co-ordinate the branch's work on international relations
- to ensure that branch members are informed of national policy on international matters
- to receive and distribute relevant information
- to encourage members to be aware of the importance of international solidarity issues within the context of the overall work of the union
- to liaise where appropriate with regional international structures and to ensure that the views of the branch on international activities are reported appropriately
- to liaise with other branch officers concerning publicity and education on international issues

- to liaise with the solidarity organisations and campaigns that UNISON is affiliated to
- to encourage members of the branch to take action and participate in international solidarity activities organised nationally or regionally
- to ensure that information on branch activity is shared at regional and national level
- to seek to develop an international perspective among members, stewards and branch officers.

#### **ENVIRONMENTAL OFFICER**

Interested members should note that this is still very much a new role. Nothing in here is set in stone and we are keen to learn from our experience over the coming months and years as this area of work develops further.

There are other materials on the green pages of the UNISON website that provide further support for environmental representatives and branches.

The job of trade union environmental representative involves representing the workforce in discussions and negotiations regarding the development and implementation of company / employer environmental policies and practices.

Where resources and capacity exist, the job can also involve acting on behalf of members as a link person with local environmental campaign organisations such as Friends of the Earth, Greenpeace or Stop Climate Chaos.

Environmental policies and practices can cover areas such as energy use, recycling, travel and procurement.

Steps for an environmental rep to help cut energy use and CO<sub>2</sub> emissions include:

- understanding how and where we use energy at work (for example, lights, works transport, heating, canteens, use of computers and printers)
- thinking about how things could change
- developing a plan in partnership with the employer to make change happen
- setting priorities for change
- making a detailed plan of what will happen and when.

A similar approach can be taken to recycling and use of resources:

- looking at what happens now (are there recycling bins, does everyone use them, are there things that we throw away that can be recycled?)
- thinking about how we can reduce waste at the workplace
- developing plans to do more to reduce, re-use and recycle.

The methods you would use to fulfil your duties as a trade union environmental representative would include the following:

- carry out environmental audits and walkabout surveys
- carry out environmental risk assessments
- communicate with UNISON members
- access information from your employer about the organisation's environmental impacts (ie energy used and carbon footprint).

### **PROFESSIONAL SERVICES OFFICER**

There are currently 1.5 million health workers who are registered with a professional body. For example, nurses and midwives need to be registered with the Nursing and Midwifery Council to be able to work as a nurse or midwife.

UNISON recognises that these members need specific support and this forms the role of the Professional Services Officer who must be in a Registered Profession. The duties of the Professional Services Officer include:-

- to be the identified and well publicised point of contact in the branch for Professional Registration and Fitness to Practice issues
- to represent the needs and interests of all the branch's Professional Registered members in the provision or advancement of health care, social care and education
- to provide support and advice to stewards and members in issues relating to Professional Registration
- to provide support and assistance to stewards representing members with Fitness to Practice concerns
- to make sure that other branch officers and the branch committee consider the Professional Registration implications in everything they do
- to be the branch's lead on Professional Registration issues in negotiations with the employer and discussions within UNISON
- to be trained as necessary to keep up to date on Professional Registration issues
- to liaise when necessary with the relevant UNISON Regional staff and UNISON's Professional Services Unit

### **YOUNG MEMBERS' OFFICER**

The role of the branch young members' officer is ideal for someone who is interested in becoming more active in the union. The post may be a stepping stone to becoming a steward or taking on wider roles.

Tasks relating to the post of young members' officer:

- to recruit new members and to encourage existing young members to become active in the branch
- to make sure issues of concern to young workers are raised by the branch
- to act as a focal point for all young workers in the branch and workplaces
- to receive and distribute UNISON young members information
- to encourage involvement in UNISON young members campaigns
- to build branch young members organisation and to ensure there are potential new young members' officers in the future.
- Other branch officers will assist in these tasks.
- Branch young members' officer must be under 27 years of age for the whole of their term of office.

### **LABOUR LINK OFFICER**

The Labour Link officer is elected and accountable to the Labour Link section within the branch and must be an individual member of the Labour Party – this is because the post holder should work to take UNISON policy forward in the party, often being a delegate to the general committee of the party and encouraging joint work and campaigning with the local constituency Labour Party (CLP).

The branch UNISON Labour Link officer is the key contact point for information about regional and national UNISON Labour Link matters and is responsible for co-ordinating our activities in the branch. They also represent the interests of Labour Link levy payers on the UNISON branch committee.

The Labour Link officer will receive support, training and advice on their role and responsibilities from their regional political officer.

Tasks relating to the post of Labour Link officer:

- to explain and develop the role of the UNISON Labour Link within the branch and ensure that correct procedures are followed regarding the rights of Labour Link levy payers
- to receive correspondence and information on Labour Link matters from national and regional levels and from the Labour Party
- to circulate information to Labour Link members in the branch and convene meetings of members as necessary
- to attend the UNISON branch committee and agree appropriate means of promoting UNISON policy in the party
- to organise elections for branch UNISON Labour Link representation within the regional Labour Link as necessary and ensure reports are made by branch delegates on their activities on behalf of members

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- to liaise with the Labour Link regional political officer
- to promote political education and policy discussions
- to strengthen links with local Labour Parties by affiliating to constituencies and electing delegates to attend meetings
- to communicate with Labour Party members within the branch and encourage individual membership of the Labour Party
- to build campaigning work around key issues and co-ordinate campaigns with the Labour Party in council, Westminster, Scotland, Wales and European elections.

### **RETIRED MEMBERS' SECRETARY**

The role of the retired members' secretary is to enable retired members of the branch to continue to be active in the union through the branch's retired members' section.

Tasks relating to the post of retired members' secretary:

- to ensure that those members approaching retirement have the opportunity to become retired members
- to organise meetings of the branch retired members
- to encourage the participation of retired members in branch activities as appropriate
- to establish links with other retirement organisations in the area
- to attend meetings of the branch committee
- to submit a budget to the branch committee to fund retired member activities and to ensure that the retired members section functions in accordance with UNISON rule and any branch standing orders and procedures.

### **WELFARE OFFICER**

Tasks relating to the post of branch welfare officer:

- to ensure that branch officers, stewards and workplace representatives, and also employers, have regular up-to date information about UNISON Welfare and its range of services
- to ensure that members seeking welfare assistance receive a prompt, supportive and effective response
- to liaise and co-ordinate with regional and national levels to ensure that UNISON Welfare support is provided effectively
- to undertake training and seek advice from UNISON Welfare where necessary
- to develop and implement local welfare activity
- to develop links with local charities and sources of support such as Citizen's Advice Bureau and women's refuges.

### **AUDITOR**

The role of the auditor is to act on behalf of the branch's members to ensure probity and that all branch expenditure is underpinned by democratic decisions made in accordance with UNISON rule. A candidate for the post of auditor cannot be a member of the branch committee.

Tasks Relating to the post of branch auditor:

- to oversee the financial records of the branch
- to undertake an annual audit of the branch financial records
- to provide a written report of the annual audit to the annual general meeting
- to report any financial irregularities to UNISON's internal audit department.

### **STEWARDS**

The UNISON steward is the fundamental building block of workplace organisation. UNISON is committed to identifying, supporting and training as many members as possible to take on the role of steward or workplace contact.

Stewards might be active in different ways and to different degrees depending on their willingness and experience ranging from high-level negotiators to local contacts in the workplace.

Tasks relating to the post of steward:

- to be the first and main point of contact for members with the union
- to recruit new members
- to work with members to establish an organised workplace
- to support and advise members on workplace issues
- to act as a spokesperson for the members they represent and for the branch
- to represent members with the employer, dependent on their experience and confidence
- to represent members within the branch committee
- to be answerable to the members they represent.

## WORKPLACE CONTACTS

Members who might not be willing to take on the full role of elected steward can play a vital role in ensuring that UNISON has a presence in every workplace. Not an elected position, it can also prove a useful way for a member to gain experience or build confidence before making a further commitment.

Tasks relating to the post of workplace contact:

- to be a point of contact between members and the branch
- to recruit new members or introduce new employees to a branch officer
- to give support to members at work by advising them where to seek assistance
- to keep notice boards up to date
- to distribute information sent by the branch for members.

## HEALTH AND SAFETY REPRESENTATIVES

The role of the health and safety representative may be fulfilled in one of two ways:

- by stewards acting in a dual capacity
- by members who have an interest in health and safety elected to the role. Where health and safety representatives are not also stewards, branches should ensure that those health and safety representatives are:
  - accountable within branch arrangements to those they represent

- have access to local negotiations so that the health and safety implications of any decision are properly considered at an early stage
- trained in dealing with management and members
- valued equally with stewards and other representatives within the branch, and included in the branch committee
- encouraged to work with stewards, branch officers and members.
- All safety representatives require regular information on health and safety issues, training, and support from the branch and regional office. Employers and the regional office must be notified in writing of the names of elected health and safety representatives, and of stewards who are also safety representatives.

Branches must:

- Notify regional office of all newly elected safety representatives.
- arrange for safety representatives to meet together with the branch health and safety officer, and to inform other meetings within the branch and other branch officers and representatives
- establish procedures for raising issues with management
- provide access to appropriate training
- Allocate branch resources to the branch health and safety officer and to safety representatives.

### **LEARNING REPRESENTATIVES**

Learning representatives are selected by branches and are volunteers who are willing to encourage and support other colleagues with “learning” in the workplace.

The branch is responsible for ratifying their appointment and issuing credentials. Their work should be supported by the branch education co-ordinator and the branch lifelong learning co-ordinator. Learning representatives are accountable to the branch and branches should ensure that there are means by which learning representatives can report on activity and participate in the development of the branch through an education network led by the branch education and lifelong learning coordinators.

Tasks relating to the role of learning representative:

- to raise awareness of lifelong learning issues in the workplace
- to offer support and encouragement to learners
- to encourage learners to get involved in the branch
- To work with the branch to promote workplace learning with employers.

### **WOMEN'S ORGANISATION**

Although the majority of UNISON members and employees in the workforce are women, women are often under-represented in our structures.

There are many social, cultural and economic reasons for this, but UNISON is committed to encourage and assist women's development to ensure that UNISON's leadership is a fair representation of its membership.

Some regional organisers are designated women's officer or equalities officer.

They have a particular responsibility to assist the branch to ensure that equality issues are being addressed within the branch and that the voice of under-represented groups is heard.

### **SELF-ORGANISATION**

Regional level self-organised groups are supported by regional staff and can provide direct support and assistance to branches and to individual members.

Where branches do not have the benefit of active self-organisation at branch or joint-branch level, members should be encouraged and supported to be actively involved with appropriate regional groups.

Branches are encouraged to develop organisation among under-represented groups such as women, black members, gays and lesbians, disabled members, young members and retired members by setting up self-organised groups.

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## NOTES

## UNISON benefits

Being a UNISON member gives you a huge range of benefits, including:

- Unrivalled protection and representation at work
- Help with pay and conditions of service
- Health and safety guidance and support
- Confidential welfare services for you and your dependents in difficult times
- Excellent legal services including free help with work problems and legal support for members and their families
- Pensions advice
- A special hotline, UNISONdirect, for help and advice on workplace issues
- Online employment and workplace advice
- Education and training advice and courses, leading to vocational and professional qualifications
- Cash benefits for accidents and injuries at work
- A colour magazine sent to your home four times a year, a monthly magazine for our stewards and activists and a full range of publicity
- Special deals on everything from computers, tax returns, holidays, mortgages, car breakdown services, insurance and credit cards
- Our own holiday centre for members and families at the Devon seaside

