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April 2010



Foreword

I am delighted to introduce this branch advice on organising in schools. It aims to recognise the great work happening in branches and regions now and hopefully to inspire others to develop their own school organising strategies. It demonstrates that there is no one way of doing it, although there are common themes and lessons to be learned. Teamwork between activists, school members on secondment and UNISON employees, breeds success. The ability to share ideas and offer support pays dividends. It also makes meeting the organising challenge in schools a satisfying and enjoyable activity. There are practical resource issues that have to be resolved and a joint approach has proved useful.

I do not underestimate the effort involved. There are thousands of schools scattered around the UK and in some places we are starting from a low level of membership and participation. There are, as always, a web of demands on people's time and an economic climate, which is generating financial stringency and threats to jobs. But despite this, I firmly believe that the time is right for UNISON to step up its efforts on behalf of school staff. The new negotiating body in England (SSSNB) and the changing roles and policy reviews across the UK, provide impetus for organising. Membership levels need to rise to reinforce our strength and members need skills and the confidence to be part of a growing body of activists in the sector. New reps will help to establish a greater presence and better representation for school staff. They will enrich UNISON as a whole and hopefully themselves. These are exciting times to be organising in schools and I send everyone in the sector my best wishes.

A handwritten signature in black ink that reads "Dave Prentis." The signature is written in a cursive, flowing style.

Dave Prentis
General secretary

Background

There are more than 25,000 school workplaces across the UK. Many have been free to set their own pay and conditions of service and all have high levels of autonomy. Local management, school workforce remodelling and other policy changes have presented support staff with career opportunities, but increased the possibility of exploitation. Most support staff in schools have been part-time, term-time, low paid women in the local economy. There has been little visibility of the wide range of professional services that they provide. Schools are hierarchical settings and support staff have struggled to achieve the status they deserve.

Some progress has been made, but there are large variations in pay and conditions for similar jobs and little definition of what should be expected of particular roles. Change has led to national developments, like the School Support Staff Negotiating Body (SSSNB) in England and reviews of school support staff conditions elsewhere. The modern school environment and new bargaining opportunities provide fresh impetus to build better union organisation. UNISON's organising approach, which aims to empower members at a local level, fits well with the needs of members in schools. Dispersed, independent workplaces cry out for effective local negotiations, representation and union activity. Growing membership provides a stronger voice and the ranks of new activists bring with them fresh outlook and approaches. It is UNISON's ambition to have a contact, or better still, a trained steward in every school in the UK, fully supported by branches, regions and national office.

This guidance reflects UNISON's organisation in schools now and its aspirations for the future. It highlights successful branch and regional organising initiatives, identifies lessons learned and provides a guide to resources available to support organisers.

Meeting the challenge

Branches and regions are using various organising approaches with schools. They have common aims:

- **to recruit more school members, contacts and stewards**
- **raise UNISON's profile and increase influence**
- **inform school staff about vital issues and developments in the sector.**

The central message is that the direct approach works best. UNISON needs to commit time and resources to thousands of school visits across the UK. To help with this task, school members on secondment, funded by branches and regions, have been mobilised. They are working with other organisers; recruiting, making contacts, establishing networks and helping to build local organisation. Branch and region-based school forums and committees are taking shape and email lists are active. National and local developments are helping us through the school gates to talk to staff, as are professional issues like classroom cover and the medical needs of pupils.

The case studies demonstrate that education is a valuable part of organising. Creating and supporting training opportunities can engage members and build a positive environment for the union to flourish. Activist education is also an indispensable organising measure; building knowledge and confidence. The need for a planned and committed approach, from initial workplace mapping, through visits, to sustainable school organisation, is evident in the case studies.

UNISON believes that this is a significant moment for school support staff. There is a great deal in the balance and good union organisation will offer members enhanced protection and new and exciting opportunities.

Lessons learned from case studies

School visits

School visits are at the heart of UNISON's organising strategy. Schools with no members are a major recruitment opportunity. Those with low membership receive a much needed boost and even schools with high density really value a workplace visit from their union. Organisers have evaluated their experiences and concluded that:

- **a school visit schedule is necessary, perhaps focused around geographical clusters or current membership levels**
- **it pays to do some homework before a school visit, checking to see if anything particular is happening there and considering the school calendar**
- **getting the support of the headteacher and or school business manager is very important as some staff are still wary of repercussions from union membership**

- **if headteachers are resistant to visit requests, written support from the local authority may help. They may also be more supportive if contacted directly and thanked before or after visits**
- **visits are a chance to check staff numbers and RMS data to improve school mapping back at the branch or region**
- **visits in pairs or groups work well**
- **promotional items are always appreciated and raise UNISON's profile in the school**
- **national developments, like the SSSNB in England, are a good way in to discuss workplace issues with school staff**
- **short, informal meetings with room for lots of questions have proved successful**
- **site, cleaning and catering staff who are sometimes overlooked, should be factored into the plan**
- **revisits help build contact and a relationship with school members and reps**
- **visits have resulted in a high rate of contact/steward recruitment.**

Organising secondments and recruiting school organisers

School visits are labour-intensive and branches would be hard pushed to visit them all, especially in very large authorities. The case studies describe a process of staff secondment which has developed, most notably in the North West region. We have learned that:

- **bids to regional pools and joint financing with branches or authorities are successfully facilitating secondments and appointment of school organising staff**
- **efforts can also be made to negotiate part-time release for school visits**
- **staff respond well to organisers from the school sector – like recruits like**
- **members who are seconded from schools need the reassurance of regular mentoring and support, sometimes in team visits and shadowing**
- **secondments are helping to develop a pool of experienced school activists.**

Sustainable school organisation

Organising in schools needs to be more than a one hit wonder. It is not just about signing up as many new members as possible. It is about finding potential activists and leaders who form the front line in defence of members and promotion of their interests. Organisers suggest that:

- **long-term success depends on maintaining communication with members and reps, through newsletters, email and school forums**
- **copying and adapting materials and strategies is very useful**
- **an organising schools brand or image can help raise the profile of the campaign**
- **positive experience needs to cascade as projects roll out**
- **education is an invaluable organising tool and can be provided in a variety of settings**
- **organising staff are an invaluable new resource for schools**

- **teamwork can be key to building confidence, sharing experience and embedding a culture of organising in schools**
- **improved membership density can lead to new bargaining opportunities**
- **media interest grows with activity, raising UNISON's profile in schools.**

Regional pool bids

Organising needs resources and in various case studies their activities were funded through bids to the regional pool; a fund which exists to assist branches in organising and recruitment activity.

Making an application

Applications should meet UNISON's branch organisation and development objectives: recruitment and retention, steward and rep organisation, member participation and effective negotiation and representation. A proposal to fund school staff secondments to organise in schools should meet these objectives.

The branch bid to the regional pool should be accompanied by:

- **the latest branch assessment form**
- **copies of the branch accounts and the previous year's annual return**
- **the plan of proposed activity; actions, objectives, financial monitoring and how success will be measured.**

There will be a body of members that takes responsibility for the pool on behalf of the region, usually the body responsible for branch development and organisation matters. Refused applicants can appeal to another body, possibly the regional committee and unresolved regional disputes can be settled by the national Subscription Appeals Committee.

Other types of application

Branches can ask for help with administrative or organisational systems which could include some IT services to help networking between school activists. They can also make joint applications to the regional pool which could be useful for jointly organising programmes of school visits which cross branch boundaries or deploying seconded school members who can work together. Region wide school organising initiatives can be funded from the regional pool, subject to regional committee approval.

Case studies 1–7:

Some regional approaches

Regions are developing ‘organising in schools’ strategies with branches based on workplace visits, secondments of school staff as organisers and building local representation. In England, many are talking to school staff about the SSSNB; explaining what it will mean to them and why they need to be members or actively involved in the union.

In Northern Ireland, Scotland and Wales, organising in schools is focused on single status, other pay and conditions matters and professional issues. There is an active education issues committee in Scotland, working to engage with the Scottish parliament and a similar approach in Wales.

The following seven case studies are examples of how regions and organisers are working with branches to develop school organising strategies.

1. East Midlands

In the East Midlands, the activists on the regional school forum took responsibility for advising members on the SSSNB and providing feedback on recruitment materials and the organising approach. The region has used the national school template to develop recruitment materials which branches can customise, giving school organising a unified and recognisable look. Four organising staff are working with branches, up to 75% of their time is spent on schools in some areas. Branches are being encouraged to identify activists to get full-time release to visit schools. The region is giving central support and co-ordinating efforts.

A branch-funded organiser in Derbyshire, where there are over 400 schools, increased membership and stewards, with nine signing up for stage one training. Another 14 new stewards were recruited in school visits by Derby city branch and visits in Nottinghamshire are recruiting an average 38 new school members monthly, with 16 new stewards and contacts, where there were none before. The branch plans to visit every school without a rep, holding discussions on the SSSNB. Other branches have also been visiting schools and in Rutland branch, in the smallest county in the country, 70% of its new membership is from schools.

2. Greater London

Greater London has 32 branches with schools in them, which sets a massive agenda but also fantastic organising opportunities. School visits began in 2008 with local and area organisers mapping current and potential membership and activist numbers. As well as looking for secondments, branches have been negotiating part-time release for school staff to organise in their area. Joint training is planned with councils and the regional equal pay officer intends to visit schools to identify potential claims. The regional strategy includes setting up a school stewards' email network and the creation of a template on a memory stick for production of branch school newsletters. The region set a goal to have a secondment for school organising in every branch jointly funded by authorities, region and the branch.

3. Northern

Northern region's approach has been to encourage its 12 local government branches to undertake a schools campaign during a six month period. Branches were advised to visit as many schools as possible, opening with SSSNB news, recruiting and identifying new activists. Five branches applied for regional pool funding to facilitate six month secondment of members to lead locally. The regional office established a project team with three or four days a month set aside to support school visits. It planned to focus on one or two areas a month on a rolling programme. There have been a large number of school visits which recruited 250 new contacts, a number of new stewards and 650 members.

4. North West

The North West region has a developed strategy for organising in schools. There is a systematic approach which began with a bid to the regional pool for six to 12 week secondments of school members identified by two branches. A programme of visits had to be devised, based on geography or current membership density, after gathering baseline membership information. Letters were sent to headteachers asking for permission to talk to staff about the SSSNB. A briefing was prepared for short, informal sessions with time for questions and answers. There were some follow-up visits, letters and newsheets.

The project is co-ordinated by a regional organiser and includes a growing number of seconded members, branch, local and area organisers. They meet regularly, share materials, ideas and support each other, sometimes visiting a school as a team. Nearly 20 more branches have accessed or applied to regional pool funding to progress organising in schools. Two training courses have been piloted in the region for school contacts and stewards and a model time off agreement was developed.

In an eight month period, nearly two-thirds of schools were visited, recruiting nearly 2,000 new members. There are now 1855 contacts and stewards and an email network of 870 school activists. Branches are dedicating space in their magazines or websites to school members, developing email activist lists and setting up forums where school issues can be discussed and contacts encouraged to make the jump to becoming stewards. The region has focused on activist recruitment and believes that the project has enough momentum to carry forward sustainable organising in schools.

5. Wales

A Cymru Wales meeting of school contacts in 2009 led to a number of school organising initiatives in the region. A regional newsletter was produced and a well-attended conference was held. It was followed by a lobby of the Welsh Assembly office with a plea to recognise the vital role of school support staff. Meetings have followed and a media profile has developed. Organisers in the area teams have been leading visits and events, building on the momentum from the conference. There is a programme of school activities across branches, many of which are prioritising school organising in their branch assessments. The Independent Safeguarding Authority and single status are popular issues for discussion in school visits.

6. West Midlands

The West Midlands region declared the first week of October 2009 'blitz on schools' week. Nearly 60 staff, organisers and others, went on the road and visited over 200 schools, leaving a skeleton staff in the office. Organised in small teams, the aim was to have a UNISON contact or rep in school at the end of every meeting, as well as new members. Branches were consulted on which schools to visit and materials were prepared. The week resulted in:

- **183 meetings covering eight branches with LEAs**
- **2061 members and non-members attending UNISON meetings**
- **193 new members**
- **296 new contacts or reps.**

The positive results continued to filter through in subsequent weeks and months. October 2009 was the best month for recruiting new members in schools – 403 compared to the previous best month of April when 240 new members joined from schools. There were 248 additional new members in November and the momentum continued until the end of the year. Since then, West Midland branches and organising staff have visited more schools.

In some areas there have been further weeks dedicated to school visits. In other branches, they are setting aside particular days of the week for school meetings. School contacts and reps are kept up to date on SSSNB developments by email and the region has regular school support staff forums. Branches and organisers are working to build schools organisation within branches, including improving communication, arranging schools contact meetings and training.

7. Yorkshire and Humberside

A Yorkshire and Humberside region led schools organising project has been running since September 2009. It delivered more than 1000 new members and 400 new school activists in the three month phase one. Supported by funding from the regional pool, 10 members of school support staff working in six of the region's 14 authorities were seconded from school to work on the organising project.

Three of the initial branches continued their involvement into the second phase. This concentrated not only on recruiting new members but also on building new networks of stewards and school based activists. Phase three was planned with three new branches joining the project.

Case studies 8–15:

Branch-based organising in schools initiatives

Branches are working as part of regional networks to develop coherent 'organising in schools' strategies. Regions are also providing resources which target specific branches. Education convenors and lead school representatives, supported by organising staff, continue to develop their school membership and build workplace representation. The following case studies are examples of branch based organising activity.

8. London Borough of Barnet

The London Borough of Barnet contracted out its school cleaning service in 2008. The right to participate in the council's training programme was lost in the procurement process, so the branch education team stepped in. They realised that many of the cleaners would benefit from English for Speakers of Other Languages (ESOL) courses and were determined to secure paid release for them to attend. The key was the responsibility on local authorities, schools and colleges to safeguard and promote the welfare of children and young people. The case was made that children were inclined to speak to someone they know and that cleaners were more likely to live locally than many other school staff; this was born out by branch research. But the cleaners were unable to attend safeguarding training, so lengthy talks began between the branch, the council procurement team and the contractors. The need for training was agreed and the need for ESOL to maximise the benefit was accepted. The employers paid the cleaners to attend classes on a Saturday morning at UNISON's training rooms and they have proved popular. They are open to all staff but are an inevitable recruitment tool as an object lesson in the positive role of a trade union.

Barnet is also promoting Return to Learn courses and considers its union learning reps to be a vital part of the organising team. Barnet branch is also holding meetings for school members every term and has organised volunteer reps to run an advice hotline for school staff.

9. Cardiff

Cardiff branch agreed at the end of December 2009 to run an organising in schools project in 2010. The plan consisted of a month of mapping and information gathering, a regional pool bid, a school stewards' meeting, preparation for a blitz week and completion of a schools newsletter. This was to be followed by identification of target areas, planning of school visits and the preparation of membership packs and training materials. The blitz week was planned for March, with organisers and volunteers visiting schools and homes. During the blitz, a daily brief was to be held, member and non-member information updated and school issues identified. Follow up visits were planned, contact with potential union leaders and the development of a campaign committee and strategy. The branch was determined to reach a position where school members could organise themselves and take ownership of their issues.

10. Dorset

Dorset branch employed a school organiser on a one year contract to make contact with existing members, raise awareness of UNISON and recruit and organise new members. The organiser's approach was:

- **recruitment packs were produced and visits to schools planned**
- **timing was crucial and was most effective when the headteacher agreed to meetings being held during the school day or on training days**
- **various approaches were tried and 30 minute informal meetings with room for lots of questions were the most successful**
- **the talk was refined on the basis of frequently asked questions about issues like industrial action and intimidation of union members**
- **school staff often had very little knowledge of UNISON or unions in general. Stories of how the union had helped with a range of school-based issues were told, dealing with accusations, parental complaint, bullying, redundancy and more**
- **the welfare service, insurance, Croyde Bay and other benefits of membership, including learning opportunities, were detailed and recruitment materials, with freepost envelopes were handed round**
- **lay structures in the union were described as well as the role of stewards, with a job description provided**
- **the application form was explained and ways in which subscription costs could be off-set**
- **goodie bags with promotional products were given to those signing up on the day and proved popular**
- **a folder of materials and contact numbers and cards was left behind**
- **apart from talking to non members in the hope of recruiting them, making contact with existing members was felt to be of great value as many had never met anyone from the union before or only when there was a problem or a crisis**
- **a local schools website – unisondorsetschools.com was set up to include news and articles from the branch, details of help and support available, updates on national campaigns and a question & answer section. It linked to the UNISON national website and to other sites with information on relevant topics. The site proved popular and included the facility to ask questions of the local MP, Jim Knight, who at the time was the minister for schools.**

11. Essex

A member of Eastern regional staff was seconded to Essex county branch as an organiser, funded partly from the regional pool for a 12 month period. Using the SSSNB as a theme and UNISON's leading role, the organiser visited secondary and then primary and special schools. The large number of schools in the county meant that a targeted and planned approach to visits was needed. Follow up visits, phone calls and email chase-ups of applications proved fruitful. The need to identify and mentor new stewards and contacts was a priority and 38 were recruited as well as 300 members.

Eastern region reviewed this and another project run by the Norfolk and Suffolk team and welcomed their success. It also concluded that projects which rely on an individual member of staff carry risks of isolation, heavy workload and potential burn out. It was agreed that systems of support should be in place.

12. Kent

A bid to the regional pool submitted by the regional officer, branch secretary and area organiser on behalf of Kent branch was successful. The branch matched the funding and an organiser was employed to work with about 620 schools in the county. During the nine month project over 50 new school stewards were recruited, with nearly 20 more coming forward afterwards. Up to 50% of new branch members every month were school staff. New consultative structures have been created on the strength of increased membership density.

The branch submitted another bid for a further 12 month contract for the organiser, which was successful. It was based on the continuing recruitment potential in schools and the need to build up a coherent school structure and network of activists.

13. Norfolk

Staff in Norfolk's 452 schools were facing issues arising from single status and budget cuts. Other unions were using national initiatives to go into schools and the branch decided that it had to move from a responsive to a proactive approach. The branch appointed a development worker to focus on children's services, primarily schools. The six month post was jointly funded by the branch and the regional pool. Setting up an email network for stewards and another for contacts was a priority. Norfolk is a large rural county, so finding a way to keep members informed is crucial. School stewards' meetings were trialled and 10 special school stewards were meeting quarterly.

The branch saw a substantial increase in school membership and activity and decided to fully fund a permanent post. In 2008, there were 489 new school members, with another 200 joining in the following six months. School membership rose to 2,000 by 2009, with 50 stewards and ambitions to grow even more.

14. Swansea

The regional South Wales team agreed to run a school organising pilot scheme in Swansea branch. After a mapping exercise, they established that there were 1,458 potential recruits and a need to retain existing members with a raised profile. A survey was carried out which identified the school issues as: working over and above job description/level; covering for teachers; teaching whole classes without support; administering medicines and extra duties.

New members and contacts were recruited, a new steward and two elected senior representatives for education. The plan was then to organise:

- **a stewards' meeting to discuss the survey results**
- **a development day for existing and new reps**
- **a joint seminar with the local authority for all school support staff.**

Target schools were identified and an application was made to the regional pool for funding to release reps to visit them. A project review was planned. An area organiser took one of the issues identified in the survey, administering medicines, and designed a PowerPoint presentation to take around to schools. It dealt with roles and responsibilities, staffing issues, training and risks and, in addition, infection control, toileting and nappy changing. The PowerPoint then became a resource which other organisers could use in their approaches to school staff.

15. Torbay

Torbay branch development officer established an organising plan for schools, mapping the number of schools, membership density, reps and local conditions as a starting point. The focus was on 45 local authority schools, mostly primary with less than 10 members and no activists. There were reports that under remodelling, staff were being asked to take on additional tasks without a review of pay and were unsure of their rights. This gave the branch a campaign and organising issue to take into schools, helped by a learning and development agenda to build member confidence.

The plan was to:

- **build self-sufficiency in schools and a local ability to give advice and representation**
- **create a distinctive voice for school members on workplace issues affecting them**
- **achieve a strong, local and sustainable UNISON profile in schools**
- **improve the flow of information between the branch and school members**
- **integrate school activists into branch structures and ensure their involvement and take-up of services.**

A seven phase campaign was devised involving:

- **research and planning, including applications for funding and preparation of materials**
- **negotiations with the authority to develop a partnership approach to recruiting union learning reps (ULRs), a learning agreement and “Because We’re Worth It” communications strategy**
- **a survey of school members, school visits, activist recruitment and meetings with headteachers to develop local agreements**
- **teambuilding, branch induction and network/structures development**
- **identifying a lifelong learning co-ordinator and deciding on ULR training delivery**
- **training needs analysis pilots in schools, selecting courses and negotiating the opportunities**
- **a publicity event and awards ceremony for achievement, school leadership in learning and ULR certification.**

In Torbay, the organiser went to work with a wide range of partners, for example, student bodies and drew on the experience of other branches which had run similar projects. Engagement through learning was identified as an organising tool that would appeal in a school environment.

Organising in schools resources

Using IT and media techniques

Schools use computers and intranet extensively and all staff should have access to them and appropriate training. Where they do not, because, for example, they do not have an office, reps might negotiate access points in the school library or IT suite, for example, and training.

There are a vast number of websites and pages, which contain a great deal of useful information. They provide access to information, advice and networking opportunities. School members have been communicating in professional e networks for some time. They can share experience and act as a sounding board for new developments (education@unison.org.uk for more details). Discussion groups on negotiating and campaign issues can be launched as well as e petitions and surveys. UNISON is making increased use of electronic media and online recruitment is available. School members should be mindful of any policies or agreements in place about use of the internet and social sites.

UNISON's website

The UNISON website contains a wealth of information to support organising. Sometimes, the volume can be overwhelming and it helps to point members in the right direction. One of the tabs at the top of the web front page is 'Get Active'. It contains advice on getting involved and the various roles that are open to members. There is an activists' zone – news, campaigns, briefings, organising tips and more.

It also contains advice for activists; a series of notes on:

- **the role of a steward, health and safety rep, workplace contact and ULR**
- **why being a rep and knowing your members is important**
- **recruitment, retention and organising (and how to do it)**
- **dealing with members' problems (refers to UNISON's representation guide and sets out legal rights of employees)**
- **local bargaining advice (refers to UNISON guide for negotiators)**
- **health and safety (health and safety law info and link to h & s webpage)**
- **campaigning**
- **rights as a union rep (includes advice on paid time-off)**
- **the role of a branch**
- **branch development (includes organising advice)**
- **procurement (contracting, commissioning and private employers).**

There are various other zones on UNISON website, for example, bargaining, employment advice, health and safety and equalities.

School web pages

Under the tab 'At Work', branches can access the education web pages and within them, the schools pages (education.org.uk/education/schools). These contain news items and announcements and there is a dedicated SSSNB page. Under 'resources', there are various publications – recruitment leaflets, newsletters, and newsletter and PowerPoint templates which can be customised for local use.

Learning and Organising Services (LAOS)

The case studies demonstrate that access to learning can be a valuable organising tool. LAOS website promotes courses, ULRs' training and provides various relevant documents. There is an Employers' Guide to Lifelong Learning which documents partnership working to deliver training and staff development. There is a list of regional education officers who can provide details on courses and availability, as well as learning and development organisers. National pilots of school reps' courses have been rolled out and branches can see if they are available locally.

School promotional products

UNISON has developed a range of 'UNISON in Schools' items for recruitment and organising events; rulers, pencils, pencil sharpeners, cases, rubbers, pens, post-it notes, a stress pencil and banana for school meals workers, daisy wheel markers, a stapler and bags. These are available for purchase from TC-unison.co.uk, and are always popular, spreading the name of UNISON around schools.



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**unison.org.uk/join or
call 0845 355 0845**


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