

**Branch Secretaries**

**Starter Pack**

** Revised 8 May 2014**

**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. Download or order from the Online Catalogue, Branch Organisation section, Stock No 0834 - <http://86.188.184.25/fmi/iwp/cgi?-db=Online%20Catalogue&-loadframes>

**Running the Branch**:

**The Code of Good Branch Practice** This gives guidance and advice on the many practical, constitutional, organisational and procedural issues that confront branches. Download or order from the Online Catalogue, Branch Organisation section, Stock No 0717 - <http://86.188.184.25/fmi/iwp/cgi?-db=Online%20Catalogue&-loadframes>

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** are set out as an appendix to the Code of Good Branch Practice. Branches should draw up branch rules based on these core rules, relevant to their size and

spread of membership, having regard to the explanations and options in the footnotes.

**Organising your Branch Annual General Meeting**

* This must take place between 1 January and 31 March each year.
* 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**

**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 and send the ‘Notification for Workplace Reps’ form, download from the Online Catalogue, Branch Organisation section, Stock No. 0852, <http://86.188.184.25/fmi/iwp/cgi?-db=Online%20Catalogue&-loadframes> so that the region can note the new rep’s status on RMS. Some regions will then notify the employer on behalf of the branch and in others, the branch will do this themselves. Branches will therefore need to check what the practice is within their region.

**Representing members and using CASE forms**

UNISON’s Representation Guide gives clear advice on working with members on representation issues. This guide, Stock No.2426, can be downloaded from the Online Catalogue, Branch Organisation section, <http://86.188.184.25/fmi/iwp/cgi?-db=Online%20Catalogue&-loadframes>. The most up to date CASE form is also available from the Online catalogue.   
As from 6 May 2014 it will be compulsory for anyone wishing to make a complaint to an employment tribunal to first notify ACAS of the dispute, the CASE has been revised to take account of this. See <http://www.unison.org.uk/for-activists/activist-news-and-publications/new-case-form-and-guidance> to download the latest guidance on using the CASE form and for links to Word and large print versions of the form as well as the pdf version in the Online Catalogue.

**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**

To understand how the branch should reimburse expenses for members and make honoraria payments, see the *Branch Members Expenses includintg Honoraria*, downloadable from [http://www.unison.org.uk/for-activists/your-branch/branch-resources/?Module[6712][viewPage]=3](http://www.unison.org.uk/for-activists/your-branch/branch-resources/?Module%5b6712%5d%5bviewPage%5d=3)

**Updating Members’ details on the Membership Records System**

Branches who are live on RMS, can do this themselves. Alternatively branches can arrange this via their region or point members to <http://www.unison.org.uk/my-unison> to notify UNISON of their changes .

**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* explains the process – download from <http://www.unison.org.uk/for-activists/your-branch/branch-resources/?Module%5b6712%5d%5bviewPage%5d=3>

The **Branch Development and Organising Toolkit** <http://www.unison.org.uk/for-activists/your-branch/branch-development/how-to-guides/> 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 <http://www.unison.org.uk/for-activists/training/u-train/> 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 can provide details of your region’s training programme. This may also be available on your region’s website <https://www.unison.org.uk/regions/> together with application forms

The *Guide to Developing and Supporting Workplace Reps* offers advice on buddying and mentoring to support reps to get active in their workplaces, and the *Trained and Active Plan (TAP) form Trained and Active Plan (TAP) form* provides a questionnaire to work through with reps to record training needs and progress towards them. Both of these can be downloaded from <http://www.unison.org.uk/for-activists/training/workplace-reps/>.

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

The Conference timetable <https://secure.unison.org.uk/unisonf0d2bfd2bf1d3bbfa7ac24c0e625b2ff6c26750879/unison1/about/events-and-conferences/national-conferences/> gives details of forthcoming conferences, as well as useful download links for 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 <https://secure.unison.org.uk/unisonf0d2bfd2bf1d3bbfa7ac24c0e625b2ff6c26750879/unison1/about/events-and-conferences/national-conferences/national-delegate-conference-2014/> 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 members in campaigning 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

These can support branches and regions in meeting current challenges. Speak to you regional organiser for more information.

**Making a Regional Pool Bid**

The Regional Pool is a dedicated pool of money to fund branch development 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. Speak to your regional organiser for more information.

**Complying with Data Protection Legislation**

This guidance <http://www.unison.org.uk/privacy-policy/privacy-policy-data-protection> 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. To access to the catalogue visit <http://86.188.184.25/fmi/iwp/cgi?-db=Online%20Catalogue&-loadframes>

**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 dates <https://secure.unison.org.uk/unisonf0d2bfd2bf1d3bbfa7ac24c0e625b2ff6c26750879/unison1/about/events-and-conferences/national-conferences/national-delegate-conference-2014/>

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 <https://secure.unison.org.uk/unisonf0d2bfd2bf1d3bbfa7ac24c0e625b2ff6c26750879/unison1/about/events-and-conferences/national-conferences/national-delegate-conference-2014/>

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.





