

Branch Education Co-ordinators

Starter Pack

September 2015



Getting started

Your role as Branch Education Co-ordinator is vital in ensuring that activists and reps are trained and supported to carry out their roles effectively.

Your first task as a new branch officer is to sign up for Branch Education Co-ordinator training. This will give you the knowledge, skills and confidence to carry out this role and to enable you meet other branch education co-ordinators.

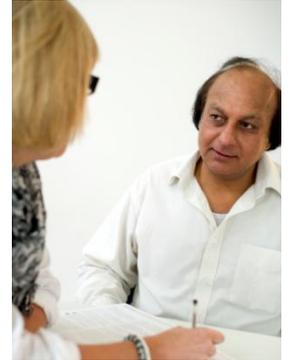
The purpose of this guide is to help you set up systems for co-ordinating and keeping records of learning in your branch and to signpost you to information to help you carry out your role.

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What a Branch Education Co-ordinator does

The Branch Education Co-ordinator's role is set out in UNISON's 'Code of Good Branch Practice'. Your branch may also have a Branch Life Long Learning Coordinator with whom you should work closely.



Tasks relating to the post of branch education coordinator include:

- making sure all new stewards and reps receive information about the branch and their duties, e.g. stewards handbook, Rulebook, service conditions agreements, etc
- publicising the range of educational and training opportunities available to members and activists, and making sure that all reps complete appropriate training for their role
- talking to existing reps about their ongoing training and development needs;
- supporting and co-ordinating the work of buddies and mentors in the branch.
- co-ordinating and supporting the work of union learning representatives, working with the Branch Lifelong Learning Co-ordinator where they are in place
- maintaining contact with the regional education officer/ regional learning and organising committee
- organising a plan of training for activists and producing an annual budget to meet its costs
- keeping records of who completes courses in the branch and when
- negotiating with the employer, along with union learning reps on issues relating to learning including time off

Training for Branch Education Co-ordinators

Signing up for Branch Education Co-ordinator training is your first step in getting started in your role. To apply for Branch Education Co-ordinator training or to find out when and where this course will next be delivered in your region, contact your regional education officer. UNISONdirect, tel: 0800 0 857 857, can provide contact details for your regional education officer.

The Branch Education Co-ordinator course will provide you with the knowledge, skills and confidence to successfully carry out your role. After completing the course you will:

- Understand the role and function of branch education co-ordinators and the branch education team
- Understand the role of education and training in UNISON organisation development
- Be aware of the education and training opportunities available in UNISON
- Have explored ways of assessing the education and training needs of the branch, activists and members
- Be able to develop a plan for buddying and mentoring new workplace representatives
- Have experience of drawing up a branch education plan
- Know how to plan a branch education event and recruit participants

NB Once you are elected, do check that your branch has updated your RMS record to note your Branch Education Co-Ordinator status and that your contact details, particularly email if available, are correct.

Keeping training records



You will need to know who has completed training for their branch role in order to plan for future training and development for the reps and activists in your branch.

Establishing a Training Record

To start with you will need to get hold of the following lists:

- A list of all the activists in your branch on RMS (replacement membership system) in A-Z order of surname
- A list of all the activists in your branch on RMS in order of RMS Activist Role Code
- A List of RMS Activist Role Code numbers and what they mean

As most branches are now 'live' on RMS you should be able to get these lists locally.

Once you have these lists, contact your regional learning and organising team to get a copy of the AMT (activist and member training system) Training History of the Branch.

Then you need to systematically contact every activist in the branch to check:

- which posts they hold
- how long they have been in the post
- what trade union education they have attended during the last 5 years

To do this you may need the help of others in the branch, especially Branch Learning Reps. In large branches, you will need help from all the senior stewards and Branch Officers.

As you make contact with activists you will need to record information to establish training history records and update the RMS records. To help you UNISON has produced a guide, **Developing and Supporting Activists**. You can order a copy

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of the Guide via the UNISON Online Catalogue, Stock No. 2883, or download it from <https://www.unison.org.uk/get-involved/learning-development/activists/activist-training-pathways/> . This contains the **Trained and Active** Plan for reviewing development needs with your branch reps and officers. An online Word version of this Plan can also be downloaded from the same webpage or you can order a **paper version** from the online catalogue, Stock No. 2919 <https://www.unison.org.uk/get-involved/in-your-workplace/key-documents-tools-activists/online-catalogue/>.

Setting up your own Record Keeping System

You may like to use the model Training Record Form at the back of this document to keep track of the courses each rep completes.

NB THIS IS A SIMPLE SYSTEM – FILE IN NAME ORDER – A SHEET FOR EACH ACTIVIST. You may wish to copy this to a spreadsheet but remember you may not always be the Education Coordinator for the Branch. The person taking over from you will need to be able to use your system, so keep it simple and accessible for all.

You can file these forms with any Trained and Active Planning Forms, mentioned above, to keep a record of your meetings with activists, their training needs and any follow-up action agreed between you.

Maintaining Training Records

Reps and activists must complete an application form for every course they attend and either you or the branch secretary will need to sign these to give branch approval to attend. As the section on managing the branch education budget below explains, this is important as giving approval to attend means the branch becomes responsible for participants' course costs. You should keep a copy of all application forms completed in the branch with the person's training record.

It is good practice to contact course participants after their course to discuss how they got on and to ensure they have some opportunities to put what they learned into action. Some regions use a 3-part carbonised action-planning form on courses for participants to record what they will do as a result of attending the

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course. Where you can offer support and encouragement to them to complete these actions, or where you can identify with them some practical tasks they can carry out to get started, it is a great way to build their confidence and skills and help them get active in their role.

At the same time you can ask them to let you have a copy of any course attendance certificate they received for their training record.

If you have members wishing to go on TUC Stage One courses, where it can take a while for course registers to reach UNISON, you can give them a copy of the UNISON Course Attendance Certificate from the back of this document to complete on the last day of the course (the tutor should sign it) and to return it to you so that you can add it to their training record.

Data Protection and Keeping Records Securely

Remember that the Data Protection Act (DPA) applies when recording information about your members so keep it factual. Don't keep records any longer than necessary and destroy or delete old information securely.

Keep paper and electronic files securely and don't share data inadvertently e.g. adding someone's details to an existing list where they may see others' details on that list!

If a member asks for a copy of their own personal data, e.g. their training record - they may refer to this as a Subject Access Request (SAR) - you should either:

- Verbal Requests: tell them to write to the Data Protection Office at the UNISON Centre, 130 Euston Road, London NW1 2AY, and let them know that there is a fee which can be paid by cheque or postal order.
- Written Requests: Pass the request (letter, email, etc.) to your branch secretary immediately so that they can take it forward. As the union must respond within 40 days to avoid breaching the DPA, it is important that requests are forwarded quickly.

Do not give your member information from their file as it will almost certainly contain the personal data of others, which you must not provide to your member.



Planning and managing the branch education budget

Managing the budget

You should encourage all activists to undertake at least the basic training for their role. As they undertake more duties in the branch, then follow on courses and refresher courses can be considered. There should be no question about branch funds covering this training – it is a prime duty of the branch to ensure all of its members and activists are offered the opportunity to access UNISON education and branches should therefore budget accordingly.

You will need to authorise each course application and regularly report to the Branch Treasurer which of the branch activists have attended what courses as the branch is responsible for any course fees, travel and meal expenses and overnight stays should the participant have practical travel difficulties. Also if a participant cannot attend the course because of dependant relative care issues the branch should look into how these could be alleviated. This is why it is important your records are accurate in the branch.

Planning the Education Budget

The key fact to bear in mind when considering budgets is that learning comes into UNISON's Objective One – building capability to meet the current recruiting, organisational and representational challenges is the union's number one priority.

You should review branch training needs each autumn and liaise with your Branch Treasurer or branch officer team in line with regional processes to agree a branch education budget for the year ahead. Having up to date training records for your branch is the most useful starting point for this.



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There are many ways you can estimate spend on learning in the branch. Here are two examples to serve as illustrations. They both include a split between funds spent on educating activists and those spent on member education.

1. A Generic budget

This is an easy way of estimating expenditure if you have not been used to budgeting and are not sure how much things will cost or the exact demand over the coming year.

You can estimate that of the existing activists around 20% will need to attend a course and say that a notional £200 per episode will be required for course fees, travelling and subsistence expenditure. Therefore if you have 100 activists, $20 \times £200$ would give a budget of £4000.

You can estimate the branch will want to be involved in 5 Life Long Learning initiatives throughout the year and say that these episodes will cost around £200 giving a budget of £1000

This example produces a total budget of £5000 for a medium sized UNISON branch

Obviously you can experiment by varying the percentages and the notional amounts until you feel you have it about right for your branch – depending on its size, the number of activists, whether your employer is keen on the learning agenda etc.

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2. A Targeted budget

This is a more sophisticated way of budgeting. However, in order for this type of budget to work, you must have information at your finger tips, for example:

- how many of the existing activists need what kind of training and when?
- what will be the likely recruitment of new activists and what are the priorities shown in the joint branch assessment?
- how much will course registration fees travelling and subsistence actually cost?

This type of budget will vary from branch to branch depending on size, number of activists and number of activists needing training.

In the example targeted budget that follows, target numbers appear in brackets, fees are estimated at £20 per person per day and travelling is estimated at £10 per person per day.

If you are a new Branch Education Co-ordinator and/or Branch Life Long Learning Co-ordinator you may need to discuss these ideas with your other branch officers – but please remember – learning forms part of UNISON first objective and therefore your budget needs to reflect this level of priority.

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Example of a Targeted Budget:

Activist Training : Initial basic Training Courses	Fees	Travel	Totals
Branch briefings for new contacts (10)		£150	
UNISON Organising Steward Course (5)	£500	£250	
UNISON Organising for Health and Safety Course (3)	£300	£150	
UNISON Branch Officer Development Programme (3)	£600	£300	
Activist Training : Follow on Courses			
UNISON Stewards Refresher (5)	£100	£100	
UNISON Representation Skills (3)	£180	£90	
UNISON Mentoring (2)	£180	£90	
UNISON Organising Skills (4)	£240	£120	
TUC Stage 2 Health and Safety (1)		£150	
Total for Activist Training			£3,600
Resources			
LRD Employment Law book(12)	£300		
Case worker 'Kit' folder paper pen (12)	£120		
Mentor/Mentee 'kit' (12)	£120		
Total for resources			£540
Life Long Learning			
Learning at Work Day event	£250		
Travelling for (10)places on Saturday learning club events	£250		
Women's Lives for (15) branch/employer partnership	£150		
Taster for (10) Polish workers in Laundry – Conversational English	£150		
Ipad as prize for branch 'best' learner award	£350		
Total for Lifelong Learning			£1,150
GRAND TOTAL			£5,290

Developing and Supporting Activists



The most effective way you can support new and existing reps is by encouraging them to complete training and to then make it as easy as possible to put what they learn into practice. The '**Developing and Supporting Activists Guide**', has lots of ideas on supporting reps to get to grips with their role and get active in their workplace - Stock No. 2883 from the Online Catalogue or download from <https://www.unison.org.uk/get-involved/learning-development/activists/activist-training-pathways/>.

It offers ideas on:

- Keeping track of training in your branch
- Setting up a buddying or mentoring scheme in the branch to support new reps
- Holding catch-up meetings with existing reps
- Working with branch officers and your regional organiser to develop a branch training and development plan

Whether you co-ordinate a system for developing and supporting reps in your branch or work directly with them yourself, the new **Trained and Active planning form** will help to structure meetings with reps and maintain a record of what was discussed so you can follow up on progress. It is available:

- As an **online Word version** that you can enter to and save/share as needed <https://www.unison.org.uk/get-involved/learning-development/activists/activist-training-pathways/>
- As a **paper version** to order from the online catalogue, Stock No. 2919

Training for activists

Which courses should activists take first?

UNISON is keen that all reps receive basic training for their role as soon as possible after election and certainly within six months. As they take on more duties in the branch, then follow-on courses and refresher courses can be considered.

For those activists who undertake representation work and handle cases in the branch UNISON requires that they take appropriate refresher courses at least every five years. You can find out from your regional education officer which courses are offered as refresher training in your region.



Once a workplace rep has completed UNISON's Organising Steward course or a refresher course, they will be given ERA certified steward status (Employment relations Act 1999). You will be able to find out from your branch RMS (Replacement Membership System) records who needs to complete basic training to achieve ERA certification status and who needs refresher training.

There should never be any question about branch funds covering this training: it is a prime duty of the branch to ensure all of its activists and members are offered the opportunity to access UNISON education and branches should therefore budget accordingly.

Finding out more about training

- **UTrain:** Reps need a range of skills and knowledge to do their job and the

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U-train map (Stock no. 2730 from the Online Catalogue) shows you the training routes available to develop those skills and knowledge.

- **Your Regional Education programme:** every region publishes an education programme each year giving details, dates and venues of training offered across the region. To find out what is available in your region, request a copy of this from your regional education officer. Phone UNISONdirect , tel: 0800 0 857 857, for their contact details.
- **National Programme:** some activist courses are organised from UNISON Centre and details of these courses can be downloaded from the Resources section on <https://www.unison.org.uk/get-involved/learning-development/activists/activist-training-pathways/>

Running courses in your branch

It is often possible to run UNISON courses in your branch.

Contact your Regional Organiser or Regional Education Officer to find out how the region can assist you in organising a branch-based course.

You may have a Unionlearn Centre (TUC Education) close by who can provide courses in the branch but even so you should notify your Regional Organiser before making firm arrangements with external providers. This enables the union to manage:

- the ordering, storage and despatch of UNISON materials
- the development programme for tutors
- our mission to ensure UNISON activists receive appropriate levels of training

Learning and Organising Workshops

A range of short workshops has been developed for delivery in branches to help with organising and engaging members. They vary in length from one hour to half

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a day and cover a wide range of topics including organising recruitment and campaigning; service group issues; legal, privatisation and transfers; general skills development; member development learning; political education; and women's' history and campaigning .

Visit <https://www.unison.org.uk/get-involved/learning-development/activists/branch-development/> for a summary of each of the workshops. If you would like to run any of these in your branch, speak to your regional education officer or organiser.



Discussion leaders training and lay tutor training is also available to help you or other branch reps or officers develop confidence in delivering these short workshops - contact your regional education officer for more information.

Activists – Time off for Training

Stewards, health and safety reps, union learning reps and branch officers have a right to paid time off for training in their union duties in most workplaces. This also applies to part-time activists and those who take part in online courses.



It is best to advise members to give several weeks notice to employers and to provide managers with information about the course as required.

If you or activists in your branch are experiencing difficulties in obtaining time off for union training, contact your region.

Learning for Members

UNISON's Free Member Learning Offer

UNISON is offering members free one day "taster" learning workshops as an introduction to UNISON learning. The workshops available are:

- **Your skills, your future:** identifying and developing your skills, increasing confidence and celebrating your successes
- **Facing change together:** practical ways to help and support each other during times of change or uncertainty at work and ways the union can help and advise.
- **Making the most of the Internet:** searching the internet; emails and attachments; staying safe online; using the internet to save money



To find out more contact Edna Warwick, National Learning and Workforce Development Officer, e.warwick@unison.co.uk

Membership Development in UNISON

UNISON offers Introduction to study courses, for members only, which are designed for adults to build self-confidence, widen horizons and help progress at work. The courses are free and no exams are involved. Courses on offer are:

- **Return to Learn**
- **Women's Lives**

To find out more about these courses contact Lorraine Mirham, National Learning and Workforce Development Officer, l.mirham@unison.co.uk

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UNISON's Educational Bursary Fund

UNISON's National Bursary Scheme

UNISON learning grants are available to members for financial help with fees or course costs for trade union and labour movement studies and women's studies.

Learning grants and small awards are also available for members taking other courses up to degree level.

Learning discounts for UNISON members

Members can also get some fee discounts for distance learning.

For more information on the Bursary Scheme and learning discounts, visit <https://www.unison.org.uk/get-involved/learning-development/financial-support/>

Model forms

Copy the forms overleaf to help you maintain training records in your branch.

Branch: Activist Training Record Form

Last Name	First Name	Membership Number		
WORK Telephone	HOME Telephone	MOBILE		
Email				
UNISON Post(s) currently held				Date Started
Where (s)he has requested mentoring, name of buddy/mentor:				
Where (s)he is buddying/mentoring another rep, name of that rep:				
Course and dates	Date Authorised	Time Off Check	Attendance Check	Follow up

UNISON Course Attendance certificate

To be completed by the participant on the final course day and signed by the tutor

Name

UNISON Branch

I am employed by

I have attended the course

.....

Dates

Venue

Tutor's name

I can confirm that this student has attended all sessions of the above course.

Tutor's signature

Date

Students please note you may need this certificate to claim expenses and you will need it to copy to your branch education co-ordinator to maintain the record of your training history

Learning & organising