

# Branch Retired Members' Secretary Handbook

Updated 2017





# Contents

Introduction	2
Why UNISON organises retired members	3
Starting a retired members' section	4
Regional pool	7
UNISON code of good branch practice	9
UNISON rules – rules relating to retired members	11

# Introduction



UNISON provides its members with the best representation and support at work, together with a wide range of other services. We also believe that once members retire they should continue to benefit from their union membership and be able to play an active role in the union.

UNISON is unique in the trade union movement in having a retired members' organisation whose structure mirrors that of working members. This means retired members can play a role in UNISON's democratic machinery at all levels – branch, regional and national!

UNISON's retired members are an important organising asset as they continue to be committed to protecting our public services and have a wealth of personal experience to contribute to our campaigns. Retired members often have time, experience and help to give which can be a real benefit to those branches that are short of people to take on appropriate active roles.

But the foundation for all retired member involvement in UNISON is how retired members are organised in their branches. This handbook is intended to provide useful advice and information for branch retired members' secretaries who are either trying to establish new retired members' sections within their branches or develop existing ones.

UNISON believes in solidarity between the generations and UNISON's retired members' organisation makes this possible. Today's battles on behalf of pensioners will benefit future generations, and today's battles for jobs, wages, working conditions and the right to a decent period of retirement must be supported by current retired members.

I generally believe that retired members in UNISON mean that the voice of this union is louder on a huge range of issues such as pensions, the health service and age discrimination which affect all the members of UNISON.

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

**Dave Prentis**  
General Secretary

# Why UNISON organises retired members

UNISON is unique in organising retired members in the way that we do. Trade unions are usually perceived as organisations for people of working age who join to protect and improve their pay and conditions of service. But UNISON believes that a trade union should operate beyond just the workplace to ensure a fairer society for all. So it is with this in mind that UNISON organises its retired members.

## Retired members feel they are still members of the UNISON family

A trade union should reflect the society in which it operates. Older people make up the largest “minority” in society (over 10 million) and therefore UNISON cannot ignore its retired members.

Many people feel isolated and worthless when their working lives end. These feelings will increase if their trade union appears to have no further use for them and revokes their membership without giving them an option to remain involved in some way.

Large numbers of retired members have been members of the union for more than 20 years and even to non-activists the union will have been a significant presence in their lives. It is right that UNISON as a “caring” union should not cut these people adrift when they retire.

At branch level the sense of isolation can be fought by organising social events to enable former colleagues to keep contact. For those still with an interest in branch affairs efforts should be made to inform retired members of branch meetings which they are entitled to attend under UNISON rules.

## Promoting the public image of UNISON

The retired members’ organisation is also important in reinforcing the public image of UNISON. This union is seen in the media and by the public as an inclusive organisation and as the country’s leading trade union, fighting to improve the conditions of its members, many of whom are disadvantaged eg disabled, women, the low paid, ethnic minorities and the elderly.

It is important that UNISON is seen to be representing pensioner issues as it projects a positive image. When a UNISON presence is seen at pensioners’ events people tell us: “Its good to see the trade unions supporting the pensioners”.

## An asset to branches

Retired members have gained experience during their working lives which can be used to help branches in many ways.

Many branch officers find that most of their time is taken up by negotiations with employers and so extra people are needed to help out. Retired members, with their experience and time, have a key role to play in branch life.

They can help on a regular basis with things like branch mailings etc and can give an extra boost to campaigning activities when needed.

## Recruitment tool

Many people who join UNISON for the protection which membership of a trade union offers also benefit from the wide range of membership services which UNISON offers. Retired membership enables people to continue enjoying membership services such as UNISON insurance and UNISON’s charity There for You.

Retired members who have enjoyed the protection of trade union representation during their working lives are well placed to talk to potential members about the advantages of UNISON membership.

## Maintaining the link between the employed and retired (solidarity between the generations)

Retired and working members have a shared interest in the provision of decent incomes in old age, a universal health service and the creation of a civilised society. Today’s workers are tomorrow’s pensioners and older people are heavily reliant on the public services that UNISON members provide.

Over the last 20 years all governments have tried to erode the social contract by which people in employment pay for the pensions and health care of those in retirement – in the expectation that succeeding generations will do the same for them. It is vital that UNISON is seen to support solidarity between generations by enabling its retired members to be part of the campaign to protect the Welfare State which they helped to establish because the private sector could not guarantee either economic security or equal access to health care.

## Campaigning

The need to campaign on pensioner and wider issues has been shown. UNISON’s retired members’ organisation provides a “banner” in the form of a collective identity under which this work can be done, not only with UNISON members but the pensioners’ movement as a whole.

# Starting a retired members' section

The basic requirements are a supportive branch and at least one member who is prepared to undertake the necessary work.

It is important that the branch makes resources available for this initial work including finances for postage, telephone calls, email messaging and reasonable travel costs. If the branch has a branch office, it might be possible to provide typing and photocopying facilities. It must be stressed that retired members, just like any other member of the union, should not be expected to undertake a job that will leave them out of pocket. When asking for initial support from the parent branch it may prove useful to draw attention to the reasons why UNISON organises retired members outlined earlier in this document.

Experience has shown that the enthusiasm of one individual can often serve as the catalyst for the creation of a successful branch retired members' section. This can be either an existing retired member or a member who is about to retire (please note - elected officers within a retired members' section must be retired members of UNISON). The individual should keep the branch informed of the work being done to set up the retired members' section.

## Finding retired members

Just because a branch does not have an active retired members' section it does not mean that the branch has no retired members. The first place to look for retired members is on UNISON's membership system (RMS) which is the computerised list of the union's entire membership, including retired members. A list of current retired members in the branch can be requested directly from your branch membership secretary if the branch has access to the RMS or from the RMS contact at your regional office.

With a view to future retired member activity, the most important point is to ensure that members retiring now and in the future are given the opportunity to become retired members. This can be done by:

- impressing on workplace reps (stewards) the importance of letting the retired members' contact know when members are about to retire and developing contacts with personnel and superannuation staff to request information on forthcoming retirements
- sending out copies of the leaflet 'Retired? Stay in UNISON' which contains a retired membership application form (stock item no. 1248).
- seeking a UNISON slot in employers' pre-retirement courses to talk on retired membership of UNISON.

## The next step

When you have established a list of retired members, the next question is how to organise them. There are three options:

- set up a retired members' group or section attached to your UNISON branch
- join with another UNISON branch to form a retired members' group
- ignore formal organisation but ensure that your retired members are kept informed of branch meetings and are sent regular copies of journals, branch newsletters etc.
- The first option is for larger branches where there is a nucleus of retired members keen to organise regular meetings and activities. The number of meetings held will vary according to the needs and interests of the group of members. Some established retired members' groups meet monthly, others quarterly or less frequently. It should be noted that branch retired members' groups should meet at least quarterly if they wish to function effectively in relation to regional retired members' structures.

The second option is a good choice where branches have common interests - for instance where there are several small health branches in the same area, or a large local government branch near small branches of other services. If one branch has an established retired members' group, there is the added advantage of being able to draw on the existing experience of that group. If you are considering this option you will need to agree with the other branch/es concerned how the group will be financed.

The third option is the best approach if there aren't many retired members or they are scattered geographically which means that regular meetings would not be well attended. If members are keen to join an active retired members' group you could arrange for them to link in with an established retired members' group at another UNISON branch. Or if they have moved out of the area, they might prefer to transfer their branch membership to somewhere nearer their new home. In either case you should be able to obtain information on the whereabouts of a suitable branch from the regional office or the lay retired members' co-ordinator in the region concerned.

## Definition of a branch retired members' group or section

The organisation of retired members will vary according to local circumstances. However, the following definition has been agreed by the National Retired Members' Committee:

"A UNISON retired members' group or section is a number of

retired members of a branch or branches who meet together at least once a year and who appoint a retired member as their secretary. Each UNISON branch may only have one retired members' group or section."

### How will the retired members be financed?

Before establishing a retired members' group you will need to discuss this question with retired members' representatives and the officers of any other branches intended to have access to the group. National finance is not available for running branch retired members' groups and therefore must come from local sources. Ideally branches should provide adequate resources to ensure the participation of retired members as recommended in UNISON's "Code of Good Branch Practice." If the branch cannot afford the basic finance needed for administration and meetings, it might be that the retired members will consider paying a separate levy for this purpose.

Where a branch is unable to afford even the basic finance needed to set up a retired members' group, it is possible that regions might be able to assist (see information on regional pool).

Social activities, such as coach trips and lunches, should be self-supporting, but branches are able to subsidise such events. UNISON branches should fund activities such as the following:

- the distribution of newsletters to retired members
- the distribution of branch and retired members group meeting information
- administrative tasks involved in running the section including expenses for postage, stationery, printing and telephone calls etc
- accommodation (and perhaps refreshments) for regular meetings of retired members
- the payment of subsistence expenses for a delegate attending the UNISON Retired Members' Conference
- affiliations to outside organisations eg National Pensioners' Convention.

Once a retired members' section is established, it should liaise with the branch treasurer to ensure that budget setting and spending is part of an agreed budgetary process. Since January 2014, all UNISON branches are required by rule to use OLBA for all financial activity including that undertaken by retired members' sections.

OLBA stands for Online Branch Accounting and is the database where all branch financial information is stored.

The rules relating to OLBA are as follows:

G 2.2 The Branch Committee shall administer branch business in accordance with the branch rules and any guidelines issued by the National Executive Council, and in particular:

- .8 shall from 1 January 2014 maintain records of its financial transactions, assets and liabilities using the national online branch accounting system (OLBA);
- .9 shall from 1 January 2014 develop an appropriate annual budget as part of the joint branch assessment process in accordance with the Union's objectives and priorities.

### The first meeting

Once a decision has been taken to establish a retired members' group, you should arrange a meeting to confirm that the idea is viable, that there is sufficient interest and to discuss proposals for group activities. The easiest way to make contact with retired members is to produce a letter telling them the time, date and place of the meeting and the reason for holding it. It is also useful to include a tear-off slip for completion and return to give you some idea of the likely numbers. Providing light refreshments and mentioning this in the invitation, will be an added incentive to attend – especially if people are expected to travel long distances.

It might be helpful to have an active member of your regional retired members' organisation at the meeting so they can offer advice and answer questions. Your regional office will be able to suggest an appropriate person. If there is interest in setting up an active retired members' group, now will be the time to suggest appointing a secretary or even a small committee to take over the organisational work.

### What does being a retired members' secretary mean?

Any retired member who can write letters, has access to a telephone or computer and most importantly is willing, should be encouraged to become a retired members' secretary. It is not necessary for one person to do all the jobs involved – they can be shared between as many people as are available.

The key tasks for a retired members' secretary include the following:

- organising meetings of the section
- keep account of money spent on behalf of the group so that the branch can see where it goes
- ensure that the regional retired members' co-ordinator knows that the retired members' group exists
- attend and report back on meetings of the branch committee, establish links with branch workplace reps and

employers to obtain the details of members who are about to retire

- contact members who are about to retire with information on the retired members' organisation
- make sure that the RMS contact responsible for membership records in the branch knows when people become retired members
- respond on behalf of the branch to any questions posed by the region or head office
- organise the production of a retired members' newsletter
- encourage your retired members to submit motions to the branch, the regional retired members' organisation and retired members' conferences
- offer to assist the branch during campaigns
- establish links with other retirement organisations in your area so that you can join local campaigns – some national organisations with local branches are listed elsewhere in this publication
- ensure that you are listed on the RMS as your branch retired members' contact so that you will receive relevant information direct from head office
- make contact with the branch welfare secretary and liaise with her/him when you hear that a retired member is ill or needs help.

## Do retired members' groups need their own rules?

The simple answer is no - as retired members are subject to existing UNISON rules. But it is useful to agree a brief constitution to avoid disagreements arising. If retired members need help with drafting, experienced branch officers might offer assistance, and in any case, the branch committee should be asked to endorse any constitution when completed and agreed by the retired members.

A retired members' group's constitution should include the following:

- the name of the group or section, aims and objectives, a list of officers and/or a committee
- a statement of who is eligible to be a member of the group or section
- a statement on subscriptions and meetings
- how often – when the annual general meeting is to be held
- how and when elections and nominations take place.



# Regional pool

Retired members' sections should be involved in the budgetary processes of the branch but there may be activities that are not possible to identify at the start of the financial year. Sections can, through their parent branch, apply to the regional pool for funding. The regional pool is intended to assist branches with a demonstrable need for additional funding to finance development programmes based on organising and recruitment activities.

A minimum of 0.5% of the total annual subscription income is allocated to the regional pool each year. As a fixed amount of 23.5% of subscription income is allocated to branch funding each year, the regional pool benefits if the overall branch funding is less than 23.0%. More than £1 million is allocated to the regional pool each year and allocated to regions by taking into account the number of branches and employers. Unspent money is retained by the region.

Decisions on regional pool expenditure are made at regional level. Each regional committee is responsible for establishing a lay-member group to decide on funding applications and to evaluate the effectiveness of the spending.

The following are the guidelines on how the regional pool operates.

## Funding criteria

Branches applying for additional funding from the regional pool must do so as part of the branch development process. The application should be framed in accordance with the branch development organising objectives and should be accompanied by an action plan designed to achieve improvement in one or more of the following:

- recruitment of new members, and/or retention of existing members, for example, purchase of recruitment materials and resources
- member participation in the union at branch, sub branch or workplace level
- alternatively, or in addition, branches may apply for assistance in improving branch administration, buying equipment or support in setting up administrative or organisation systems
- joint branch applications are permissible
- region-wide organising and recruitment initiatives can be funded from the regional pool subject to regional committee approval.

## Approval process

Regions should identify an appropriate lay body to take responsibility for managing, and promoting, the regional pool on behalf of the region. This should normally be the body that is responsible for branch development and organisation matters.

A different lay body should consider appeals by branches – this could possibly be the regional committee.

Any disputes at regional level on funding may be referred in writing to the subscription appeals committee whose decision will be binding.

## Application

Branches should explain why they are making application for additional funding from the regional pool and how it meets the allocation criteria.

Branches statement of case should be accompanied by the following:

- the current branch development plan
- copies of the branch accounts and the previous year's annual return
- current year's budget and financial statement.

The lay body considering the application should be supplied with the following information:

- details of the branch's recent recruitment record
- information on the current branch officer and steward structure with details of recent trends in accreditation and training of stewards
- any other pertinent information on organisation issues.

This information should be shared with the branch at the earliest opportunity and where possible should form part of the application itself.

## Decisions

Regional pool funding applications should meet UNISON's branch development and organisation objectives:

- recruitment and retention
- organisation of stewards
- member participation
- effective negotiation and representation.

The lay body should consider applications and make decisions in accordance with the above criteria, publishing details of applications and decisions taken.

## Administration

The annual allocation to the regional pool will be made on 1 October each year.

The regional pool will be held centrally. Decisions taken by the lay body should be communicated to the finance income/branch services section at head office. They will adjust the next funding payment to the branch, or in the case of regional initiatives, transfer the agreed sum to the regional account.

Regions should document their decision, ie a one off payment or additional amounts over the remainder of the year, both to the branch and to finance. Each regional council meeting should receive an update on regional pool expenditure.

## Evaluation

Regions should evaluate the effectiveness of regional pool expenditure and ensure fair distribution across the union.

## Financial reports

Regions and the National Executive Council will receive quarterly expenditure reports and balance statements.

Any unused regional balance at the year-end will roll forward to the following year.

# UNISON code of good branch practice

## sections relevant to retired members

### Section 2 – Members

#### 2.11 HONORARY LIFE MEMBERSHIP

Members who have given the union exceptional service can be awarded honorary life membership on cessation of their normal membership.

Branches, regions, national committees and the NEC may make nominations.

Honorary life members are awarded a certificate and badge.

The decision on awarding Honorary Life Membership is made by the Development & Organisation Committee of the National Executive Council.

### Section 3 – Membership participation and democracy

#### 3.1 ENCOURAGING MEMBER PARTICIPATION

A strong union depends on the fullest possible participation of as many members as possible. This helps our negotiating strength. It ensures that we represent all members and that we are a democratic union.

‘Participation’ means in all aspects of union activity, for example:

- general branch meetings
- employer-level meetings
- workplace meetings
- self-organised group, young and retired members meetings
- in branch, regional or national elections or ballots
- in policy making
- in social activity
- receiving information about activities and issues
- accessing UNISON services.

### Section 11 – Branch rules, structures and officers

#### 11.2.8 RETIRED MEMBERS

Retirement should not mark an end to interest in UNISON or collective issues. UNISON campaigns hard on issues like occupational and state pensions and elderly care and seeks to persuade employers to prepare employees for retirement.

Retired members can be a useful pool of volunteers willing to be active to help out on recruitment or administrative work for the branch.

Branches are encouraged to have a retired members’ section

and to encourage the appointment of a retired members’ secretary to organise the group as well as such other retired members’ officers as determined by them. Branches should ensure sufficient resources are delegated to the section to support its activity, and all activists should notify the retired members’ secretary of members approaching retirement.

Retired members from self-organised groups are encouraged to get actively involved in retired members organisation. Retired members can participate in open meetings of branch and regional self-organised groups, as long as they do not vote on matters relating to the pay and conditions of working members or vote for positions outside retired members’ organisation. They cannot hold a position on a regional self-organised group committee, participate in the business part of a regional self-organised group AGM.

#### 11.3.1.1 RETIRED MEMBERS AS BRANCH OFFICERS

The retired members in the branch have the right to elect a retired members’ secretary annually. The secretary may attend and speak at normal meetings of the branch committee and can vote on any issue other than those which are concerned with the pay and conditions of work.

It is important that UNISON remains a vibrant union by encouraging new members to become active in all aspects of the union – bringing a fresh perspective and approach. UNISON rule prohibits retired members from standing for office other than in exceptional circumstances, and so officers who retire from work are expected to stand down immediately.

At the same time it is recognised that retired members take with them a great deal of valuable experience and sometimes have time to assist the branch in other ways – for example as recruiters or helping with administrative tasks. A member taking early retirement on grounds of disability may wish to continue to make a valuable contribution within a branch or regional disabled members group, as a member of the National Disabled Members’ Committee or as a delegate to the National Disabled Members’ Conference.

Where a branch has a special reason why a particular retired member might be allowed to stand for office, or continue in office following retirement, reference should be made to the Protocol on Retired Members Seeking Permission from the NEC to Hold Office at the earliest opportunity.

Where a disabled member wishes to hold office following retirement within disabled members self-organisation (as described above), the member may make application to do so by reference to the Protocol on ‘Early Retired’ Disabled

Members Applying to the NEC Under Rule C2.6.2.

In all cases, where branch officers are nearing retirement the branch committee should consider 'succession planning' – what can be done to identify and encourage individuals to come forward and stand for election, to assist their development needs and to ensure a managed handover of responsibilities from the outgoing branch officer to the new.

#### 11.3.14 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
- to ensure that the retired members' section functions in accordance with UNISON Rule and any branch standing orders and procedures.

To be a branch retired members' secretary, you must be eligible for retired membership under Rule C2.6.1

### Organising retired members

Branches should consider establishing a retired members' section within the branch or with other local branches if the numbers are small. Branches should ensure that retired members receive appropriate information and communication from the branch. This is most easily achieved by the establishment of a retired members' section and the election of a retired members' secretary.

Branches should:

- maintain a list of retired members
- establish a retired members' contact or secretary
- provide resources for postage, telephone, office facilities and meetings
- seek notice of future retirements and pre-retirement courses from employers
- impress on stewards to inform the branch retired members' contact of imminent retirements and distribute the booklet on retired membership.

## Section 12 – Branch administration and finance

### 12.2.5 BUDGET

Branches should prepare and approve a budget for each financial year. It is the job of the Branch Treasurer to prepare the budget, the branch to approve it through the AGM, and for the Branch Committee to monitor its implementation and agree any necessary variance.

The budget should cover all routine expenditure and also those actions agreed by the branch committee arising from the annual joint branch assessment. In particular the budget should be sufficient to fund:

- Recruitment and organising activity
- Activist training
- Expenses incurred by devolved sections to ensure activity in all employers
- Communication with members
- Campaigns and negotiations, both branch led and broader UNISON campaigns
- Ensuring members have access to UNISON's services.

#### Cost heading to be budgeted for may include:

- retired member activity

## APPENDIX A1 – CORE BRANCH RULES

### 5. BRANCH OFFICERS

a) The branch shall elect the following officers annually in accordance with rule 5c:

- retired members' secretary (elected by the retired members)

c) Election of branch officers:

- i. branch officers may be nominated by the branch committee or any two members...
- ii. nominations will be invited 12 weeks before the AGM and nomination forms will be made available through the branch web-site. All nominations must be received in writing at least 7 weeks before the AGM
- iii. each nominee will be notified and given the right to withdraw not later than 6 weeks before the AGM
- iv. if there is more than one candidate, a vote will be held
- v. the vote will be conducted by postal ballot in accordance with the procedure and timescales contained in the Code of Good Branch Practice

# UNISON rules

## Rules relating to retired members

### Rule B: Aims and objectives

#### 1. At work and in the community

1. To organise all those employed, directly or indirectly, within those areas of employment which provide services to the public whether in the public, private or voluntary sectors of the economy.
2. To seek to ensure equality of treatment and fair representation for all members and to work for the elimination of discrimination on grounds of race, gender, sexuality, gender identity, disability, age or creed.
3. To seek to protect the rights of all members to be treated with dignity and respect irrespective of race, gender, sexuality, gender identity, disability, age or creed.
4. To improve the pay and conditions of members and promote their interests.
5. To establish good relations between members and their employers, to secure the settlement of disputes arising from members' employment, and to participate in joint negotiating machinery.
6. To promote and improve the health, safety and welfare of members in the workplace.
7. To promote trade unionism.
8. To work to achieve equal access to public services for all and to ensure that all users of public services are treated with dignity and respect, irrespective of race, gender, sexuality, gender identity, disability, age or creed.
9. To promote greater employee, consumer and user involvement and representation in the delivery of public services, irrespective of race, gender, sexuality, gender identity, disability, age or creed.
10. To work with all other interested parties, individuals and organisations to maintain and improve the quality of services to the public.
11. To liaise with the UK government, devolved administrations and all other levels of government on public services and related matters and to promote and monitor legislation for the benefit of members and the public.
12. To promote and pursue environmental sustainability in all our work.

#### 2. Union democracy

1. To promote, safeguard and improve the interests and status of members and the union as a whole.
2. To promote and establish a member-led union and to carry out and fulfill decisions made by members in a spirit

of unity and accountability.

3. To promote fair representation in all the union's structures for women, members of all grades, black members, disabled members and lesbian, gay, bisexual and transgender members.
4. To encourage solidarity and an effective working partnership between members, activists, representatives, officers and all staff in the service of the Union and its agreed policies.
5. To promote and safeguard the rights of members to have an adequate opportunity to participate in the initiation and development of policy making, through meetings, conferences, delegations or ballots, and to encourage the maximum democratic debate, together with the right to campaign to change policy, while at all times acting within the rules and agreed policy.
6. To foster good industrial relations with the union's employees through their trade unions, to encourage and maintain good employment practices and to promote equal opportunities for all employees irrespective of race, gender, sexuality, gender identity, disability, age or creed.
7. To devolve to regions policy making responsibility in relation to devolved administrations while maintaining the integrity and unity of the union in accordance with the protocol issued under Rule D.2.9.5.

#### 3. Service to members

1. To provide minimum guaranteed standards of advice, representation and service.
2. To provide information and publications about the union and its work on a regular basis and in language and design that can easily be understood, including languages other than English where appropriate.
3. To make provision for certain benefits to members as provided in these rules.
4. To provide and maintain educational facilities and to encourage members to participate in them.
5. To promote, maintain and contribute to schemes and/or funds for the financial, physical and social welfare of members and their dependants.

#### 4. General

1. To maintain a political fund and the relationships which reflect the traditions of COHSE, NALGO and NUPE.
2. To assist and support other unions, organisations, charities or individuals as deemed appropriate locally,

nationally and internationally.

3. To participate in international trade union activities and to foster appropriate international links.
4. To arrange amalgamations or transfers of engagements with other trade unions.
5. To perform such other duties and engage in such other business as a trade union may lawfully undertake.
6. To seek to ensure that members, activists, representatives and staff are treated with dignity and respect at all times when participating in the Union's democratic structures. Also that members, activists, representatives and staff seeking the union's services provided by external suppliers are treated similarly by the providers of those services.

## Rule C: Membership

### 2.6 RETIRED MEMBERS

- 2.6.1 A member may apply at any time for retired membership if she/he has had at least two years' continuous membership immediately prior to their retirement from employment within those areas of work set out in Rule C.1 and who are retired.
- 2.6.2 Retired members who return to paid employment, which falls within the scope of Rule C.1 will be obliged to pay the appropriate subscription rate to remain in UNISON membership. Such members will be able to resume retired member status on ceasing paid employment.  
  
Retired members, who return to paid employment, which falls outside the scope of Rule C.1 will cease holding retired member status. Such members may apply to resume UNISON retired member status when they cease paid employment.
- 2.6.3 Retired members shall be entitled to attend branch meetings and to vote on issues not relating to the pay and conditions of members in employment. They will be entitled to stand for office and vote only for positions in the Retired Members' Organisation unless otherwise determined by the National Executive Council or as otherwise provided for in these Rules.

### 2.7 HONORARY LIFE MEMBERS

- 2.7.2 Honorary life members shall be entitled to participate in the Retired Members' Organisation and be eligible for the same rights and benefits as retired members.

## 4. Members' benefits

- 4.2 Details of members' respective eligibility to benefits are set out in Schedule B.

## Rule D: Structure of the union at national level

### 1. National delegate conference

#### 1.7. The right to attend and speak

- 1.7.8. 14 representatives of the retired members' organisation (two from the national committee and one from each of the regional committees), each representative appointed by the appropriate committees.

### 7. Retired members' organisation

- 7.1 A retired member as defined in rule C.2.6 may belong, at the member's option, either to the last branch of which she/he was a member or the branch which is based closest to her/his place of residence.
- 7.2 The retired members in a branch may form a retired members' section within the branch and elect annually a retired members' secretary and such other retired members' officers as may be determined by them and also elect representatives to other levels of the retired members' organisation.
- 7.3 Such Retired Members' sections may formulate motions and proposals to the Branch Committee and the Regional Retired Members' Committee.
- 7.4 Such Retired Members' sections shall have adequate and agreed funding for retired member activity and access to other resources subject to union guidelines.
- 7.5 The branch retired members' secretary may attend and speak at all meetings of the branch committee as determined by the branch committee rules, and may vote on any issue or matter other than one which concerns the pay and conditions of work of members of the union in employment.
- 7.6 The retired members of a region shall be entitled to form a regional retired members' committee and elect a representative to attend and speak at all meetings of the regional council, and shall be entitled to vote on any issue or matter other than one which concerns the pay and conditions of work of members of the union in employment.
- 7.7 The retired members' committee may formulate proposals, motions or other proposals to the



appropriate regional council and regional committee. Such proposals or motions may be on any issue or matter other than one which concerns the pay and conditions of work of members of the union in employment.

- 7.8 The National Executive Council shall establish a retired members' national committee composed of representatives of regional retired members organisations which may hold an annual conference of retired members and may elect two representatives to attend the National Delegate Conference. The national retired members' organisation may submit two motions to the National Delegate Conference. The National Retired Members' Organisation may send two representatives of relevant retired members to each National Self-Organised Group Conference, with the right to speak but not to vote.
- 7.9 The retired member delegates to the National Delegate Conference shall be entitled to speak on any issue which does not concern the pay and conditions of work of members of the Union in employment.

## **Rule G: Branches**

### **2. THE BRANCH COMMITTEE**

- 2.1 Each branch shall establish a Branch Committee, which shall consist of:
- .3 such representatives of the retired members' section within the branch as the branch may determine;

### **3. BRANCH MEETINGS**

- 3.1 All members of the branch shall be entitled to attend branch meetings.

### **4. BRANCH OFFICERS**

- 4.1.1 General Branch Officers shall be the Chairperson, Secretary, Treasurer, Education Co-ordinator, Lifelong Learning Co-ordinator, Equality Co-ordinator(s), Health & Safety Officer, Communications Officer, International Officer, Membership Officer, Young Members' Officer, Retired Members' Secretary, Welfare Officer and such other officers as approved by the Branch."

## **Schedule A: Rates of subscription**

### **5. ONGOING LEGAL CASES**

- 5.1 Retired members who have an ongoing legal case will pay the retired members' subscription."

### **6. Retired Members**

Retired members (other than those who were retired or life members of COHSE, NALGO or NUPE on Vesting Day £15 life membership.

- 6.1 Life Members of COHSE on Vesting Day  
No subscription is payable.
- 6.2 Retired members of NALGO on Vesting Day  
No subscription is payable.
- 6.3 Retired members of NUPE on Vesting Day  
Those entitled to a free union card shall not be required to pay a subscription. All others who have been members for at least 10 years prior to retirement shall be entitled to pay a reduced rate subscription of 5p per week (22p per month) if they wish to retain death benefit only; in which case they shall not be entitled to any other benefit. From 1 July 2003, members who are entitled to death benefit as a result of paying the reduced subscriptions due under the paragraph above will continue to be entitled to death benefit without the need to make any further subscription payments after that date.

## **Schedule B: Members' benefits**

### **2.2 Benefits of retired members**

Retired members are not entitled to the benefits of full membership with the exception of those listed in Schedule B para 2.6.4(iv). A retired member shall be entitled to apply to UNISON Welfare for assistance at times of need.

#### **2.6. Death benefit**

- 2.6.4(iv) Ex members of NUPE who retire after 1 July 1993 and hold five years service will have their entitlement to death benefit protected providing they maintain retired member status.



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